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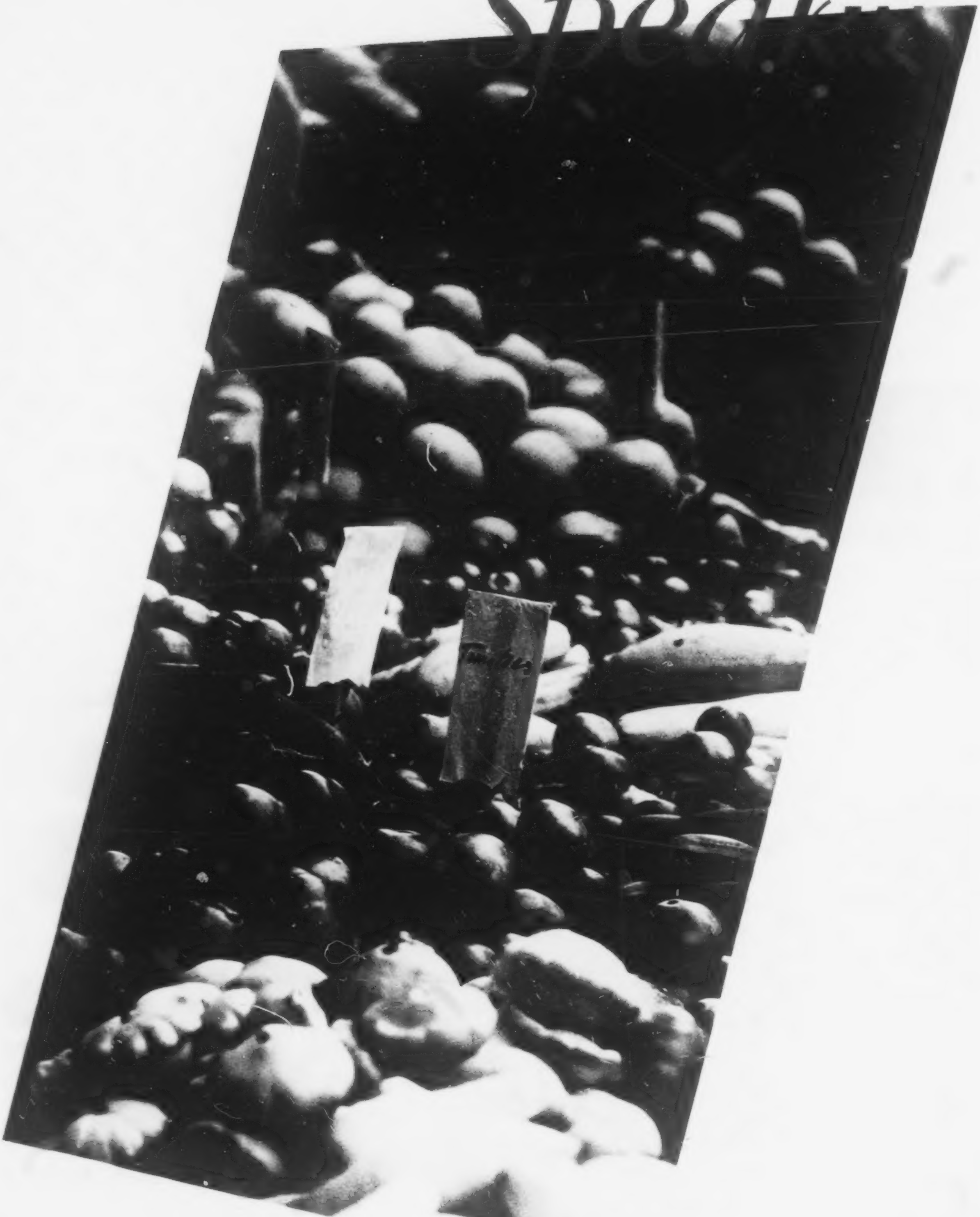

FOOD MARKETING INSTITUTE

1990

The Food Marketing Industry *Speaks* *1990*

Published by:
The Research Department
Food Marketing Institute
1750 K Street, NW
Washington, DC 20006

Price:
Food Marketing Industry Speaks, 1990
FMI Members, $20
Nonmembers, $40

Food Marketing Industry Speaks, 1990, and
Detailed Tabulations from the Food Marketing Industry Speaks, 1990
FMI Members, $25
Nonmembers, $50

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members—food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion—more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 210 members from over 55 nations.

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Key Supermarket Facts, 1989	
Median Total Annual Sales Growth	6.5%
Median Identical Store Sales Growth	5.3%
Median Weekly Sales per Store	$193,500
Median Sales per Square Foot of Selling Area	$9.45
Median Sales per Labor Hour	$100.50
Median Total Store Size	35,000 Sq.Ft.
Median New Store Size	40,000 Sq.Ft.
Average Number of Items	25,855

Executive Summary

While supermarket companies appear to have entered an era of stability in store operations and development, they face new challenges and opportunities as they enter the 1990s.

For the second straight year, the median new store size was about 40,000 sq. ft. after increasing steadily from 1979 through 1987. Less than 4 percent of the stores in operation were opened or closed in 1989 as owners continued to focus their attention on remodeling existing stores.

Median sales growth was essentially flat during the year when adjusted for inflation. While there were substantial increases in store size and new services throughout the decade, space productivity has remained steady—a tribute to the skills of America's supermarket operators. Labor productivity, measured by sales per labor hour, declined in real terms from 1980 to 1985. Historically, sales per labor hour results have fallen when the industry experiences a big change in store size. When things begin to settle down, labor productivity becomes steady, as was the case from 1985 through 1989.

But as noted in this year's supermarket operations section, changing and increasing demands by consumers for new services pose new challenges to the supermarket retailers of the 1990s.

The seafood department is one example, and this year's *Speaks* contains a special study on seafood. FMI research found that consumers are eating more seafood as part of their quest toward more healthful diets. Seafood consumption is up more than 22 percent since 1982, and over 40 percent of responding stores operated separate seafood departments with managers, and 12 percent more expect to have such a department in 1991.

Recognizing that many consumers are concerned about safety, 85 percent of FMI's responding companies favor mandatory federal inspection programs for fish.

Another key concern of FMI members is the steadily increasing cost of health care. More than half ranked this problem as number one followed by the labor shortage. Health plan premiums for food distributors have increased an average of 20 percent over the past two years, hitting smaller retailers especially hard. However, the report indicates that food distributors could do much more to help contain costs, such as requiring hospital bill audits and preadmission testing and using Health Maintenance Organizations (HMOs).

This year's *Speaks* includes a special section on advertising. FMI's consumer research found that quality produce, good variety, quality meat and low prices were the attributes shoppers wanted most from their supermarkets. Not surprisingly, supermarket ads are addressing those desires, along with the growing consumer concerns about nutrition and the environment.

Newspaper still accounts for over half the typical ad budget, but there is a trend toward more direct mail. Supermarkets are evaluating the results of their advertising much more closely than in the past—and they are becoming increasingly sophisticated in their techniques.

Speaks 1990 also includes a section on distribution centers, which focuses on engineered labor standards. Forty percent of the dry grocery centers used this method to improve productivity, and FMI survey results show that productivity typically increased 20 percent when standards are implemented.

FMI compiles the majority of the data in this report from our annual study of the industry. Survey questionnaires were mailed to U.S. and Canadian retail and wholesale companies. FMI gratefully acknowledges all those who contributed by completing the questionnaires.

Industry information is also drawn from other FMI research such as the *Operations Review*, *Facts About Store Development* and the *Annual Financial Review*. The institute would like to acknowledge data gathered from the U.S. Departments of Agriculture and Commerce and from other government agencies and publications. A detailed explanation of the study's methodology appears in the appendix.

The report contains a complete analysis for 1989, but it does not include all the data from which it was developed. This information is provided in the companion report *Detailed Tabulations from the Food Marketing Industry Speaks, 1990*. Another study, *Trends: Consumer Attitudes & the Supermarket* explores shopping patterns and attitudes toward the many issues relating to supermarkets.

The Decade of the Eighties

The industry faced many different issues throughout the 1980s. At the beginning of the decade, *Speaks 1981* observed, "For almost two years, the country stumbled across a rocky path of inflation, record interest rates, fuel shortages, and bracket creep." In 1989, the economy was healthier and the energy crises had subsided. Retailers and wholesalers surveyed in this year's *Speaks* (see "Health Care", beginning on p. 14) said that health-care costs and the labor shortage were the most serious issues faced by their companies.

Consumer activism and consumer confidence in the industry were constant concerns throughout the decade. Early on, the problem was fair pricing. Today, the paramount issues are food safety and nutrition.

In 1986 the FDA received more than 2,000 tampering complaints, a problem that still persists. As the decade came to a close, consumer worries focused on pesticide residues and such nutritional concerns as saturated fats, cholesterol and artificial ingredients.

Supermarketing Trends

The 1980s were a time of adjustment as the industry confronted these issues plus changes in the lifestyles of its customers. In 1980, slightly more stores opened than closed. Each year thereafter, though, except for 1987 and 1989, the opposite was true. The industry was in a period of consolidation, less emphasis on new stores and more on maintaining the existing store base through store remodelings.

On the other hand, the size of those stores and the number of things found in them increased phenomenally, settling down only during the last two years of the decade. New stores grew in size each year through 1987, when the median new store size was 42 percent higher than in 1980. In 1981, when total exisiting store size data were first collected, the median size was 23,000 sq. ft. compared with 35,000 sq. ft. in 1989. In real terms, median weekly supermarket sales climbed from $124,434 in 1980 to $155,778 in 1989.

Lifestyle changes of supermarket customers brought increased demand for convenient pre-cooked prepared foods, as well as a vast array of new services and non-foods. Consider that in 1980 an average of 12,745 items were sold in supermarkets compared with 25,855 in 1989. Competition for shelf space in supermarkets intensified as suppliers introduced new products in record numbers. (The number of new products introduced annually rose from 2,689 in 1980 to 12,055 in 1989 according to *New Product News*.)

During the 1980s, the in-store bakery became a mainstay, with 62 percent of stores surveyed including this service in 1989 compared with 28 percent in 1980. As the decade began, 37 percent had a deli offering carryout products. Last year, that figure stood at 72 percent. Today's supermarket also features services never imagined 10 years ago: banks, automated teller machines, video rentals, one-hour photo labs, prescription drugs, flowers, postage stamps and dry cleaning are examples.

Regional Trends

The supermarket industry reflects the regional personalities of the nation.

In both the Pacific and New England regions where population is dense, stores tend to be slightly larger than average and boast a greater weekly sales volume and sales per sq. ft. of selling space. Stores in the Pacific consistently report the highest sales per labor hour.

In the Middle Atlantic region, stores tend to be generally smaller than average in size and weekly volume. Like New England, however, they usually report higher sales per sq. ft. and higher sales per labor hour.

The Southeast, however, presents a different picture. Here, stores are smaller and sales are lower. Stores in this region normally report the lowest sales per labor hour in the nation.

Across the nation there are also sharp differences in the services that supermarkets offer. The use of courtesy booths varies widely region to region. For the past five years they have been prevalent in the East, where nearly 95 percent of the stores have them. Fewer stores in the West have courtesy booths.

Lunch counters/snack bars are much more popular in the West South Central region than in the rest of the nation. This area also leads the country in cosmetic centers and nutritional shelf tags. More stores in the West North Central region feature catering and home delivery, and Mountain stores always lead in floral/plant shops.

Where is most seafood sold in supermarkets? New England, of course. Pacific stores always register a distant second in this department. Overall, however, the Pacific region has shown the greatest change, with increases in the number of stores offering bakeries, delis with carryout and service meats.

Recent Changes in the Industry

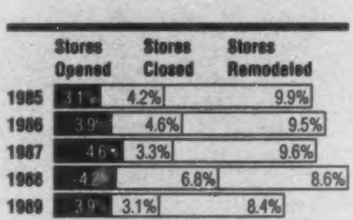
Overall, the data for the past two years indicate that the industry is entering a period of stabilization after several years of expansion. Median weekly sales per supermarket were $193,500 in 1989, slightly lower than 1988. The average number of items carried in a typical store also fell to 25,855 from 1988's 26,430. For the second year in a row, typical new store size was about 40,000 sq.ft. after dropping from 1987's all-time high of 46,890. The average store was 35,000 sq.ft. compared with 1988's 31,415. There was also less store opening and closing activity in 1989 than in previous years with 3.9 percent of stores newly built and 3.1 percent closed. The fact this year's all store size figure is close to the new store size number is another indicator that store size is leveling off.

Sales Growth

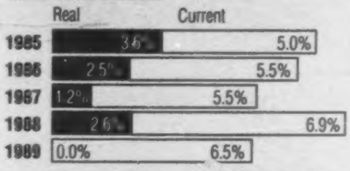
The typical company's sales grew 6.5 percent in 1989, essentially no change at all when accounting for inflation. However, this number is the midpoint of a wide range of responses; for example, 26 percent of the respondents reported growth under 2.5 percent, while 22 percent said sales grew by 12.5 percent or more.

Throughout the 1980s many factors affected the growth levels of individual companies; factors such as regional economic changes and population shifts, as well as the regional characteristics of stores.

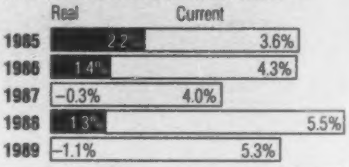
In 1989, the highest sales growth was reported by companies headquartered in the Northeast and the Pacific region. Firms with over a billion in sales reported a 9.2 percent annual growth, and firms in the $101 million to $250 million range grew by 11.0 percent.



Retail Sales Increase



Retail Sales Increase Identical Stores



Percentage of Companies in the Following Sales Growth Categories

	Total Sales Growth	Identical Store Sales Growth
Under 2.5%	25.7%	29.7%
2.5% to 4.9%	14.2%	18.3%
5.0% to 7.4%	17.5%	20.6%
7.5% to 9.9%	12.6%	9.7%
10.0% to 12.4%	8.2%	7.4%
12.5% and above	21.9%	14.3%

An excellent indicator of industry progress is sales growth in identical stores—those stores open in both years—since the impact of store openings and closings does not become a factor.

The typical company in 1989 experienced 5.3 percent growth in identical store sales—a real dollar decrease of 1.13 percent. Once again, the range of companies reporting was wide. Almost 30 percent of the companies reported identical store sales growth under 2.5 percent and 14 percent reported 12.5 percent and above.

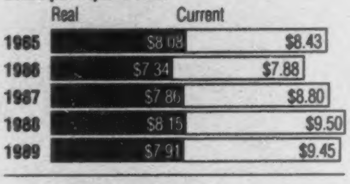
Firms with $1 billion or more in sales reported identical store growth figures near the median, indicating that their larger annual sales growth was due to new store development. Mid-Atlantic and Pacific companies reported similar results. However, those in New England and firms with sales in the $101-$250 million range reported growth in this category in line with total sales growth, an indicator that their sales success was not necessarily caused by adding stores.

Space Productivity

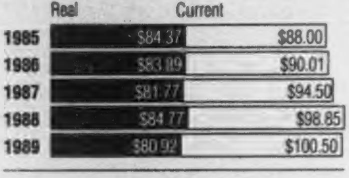
In the 1950s, weekly sales per square foot of selling area hovered around $12 in real terms. From 1960 to 1972 the figures averaged well over $10. After dropping slightly at that time, they have remained steady since the mid-1970s, ranging between about $7.25 and $8.25. In 1989, the median figure was $9.45, or $7.91 in real terms. Many factors contribute to the changes in this measure. Insights can be gained from looking at patterns in new store size. In the 1960s, new stores stayed at about 20,000 sq.ft. From 1973 on, new stores expanded, approaching 30,000 total square feet by the end of the decade although the growth leveled off in the end of the decade. Larger stores mean wider aisles, bigger front ends, etc., additional space to be included in the total selling area (customer area) used to calculate sales per square foot. The smaller stores of the 1960s packed a greater percentage of merchandise into a smaller area. Store development data also tell us that a higher percentage of the store was devoted to selling area since the late 1960s. From 1960 through 1967, selling area averaged 65.6 percent of total store area. From 1968 on, this exceeded 70 percent, where it remains today.

The fact space productivity has remained steady over the last 15 years—a period of phenomenal increases in store size, services, and number of items—is a testament to the management skills of supermarket operators.

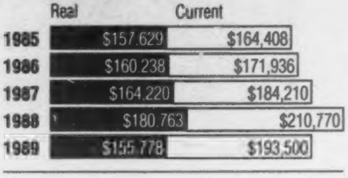
Sales per Square Foot



Sales per Labor Hour



Weekly Sales per Supermarket



Labor Productivity

Another important productivity indicator is sales per labor hour, which, in real terms, has remained steady between about $80.50 and $84.75 for the past five years. In 1989, the figure was $100.50, or $80.92 accounting for inflation. The figure declined after 1980 to just over $84.00 in 1985.

Similar trends are found since the late 1950s. The figure climbed steadily from 1960 to 1968, leveled off until 1972, dropped sharply in 1973 and inched back up to the peak in 1980. Again, there appear to be some correlations with store development trends. The sharp drop in labor productivity in 1973 coincided with an increase in new store size. New store size stayed between 26,000 and 30,000 sq. ft. until 1980. From 1980 to 1985, new store size increased 21 percent and the number of items grew by 37 percent, coinciding with the decline in sales per labor hour.

Dramatic increases in the number and types of services offered were also factors. Since 1987, store size and the number of items have stabilized somewhat although new services continue to be added. From the historical trends, it appears that labor productivity inched upward when store development trends remained stable and declined during periods of dramatic change.

The numbers do not tell the whole story. In addition to the workers in the service departments already mentioned, many of today's supermarket employees perform more tasks and provide more customer services than their predecessors. For example, today's cashiers weigh produce, sell lottery tickets and postage stamps, and sometimes even function as bank tellers. The vast number of items carried complicates the stocking responsibilities for clerks.

Services Offered in Supermarkets in 1989

	All Stores	Stores in Top Identical Store Sales	Stores in Top Sales per Sq.Ft.	Stores in Top Sales per Labor Hour	Stores in Bottom Sales per Labor Hour
Deli w/Carryout	72.4%	74.3%	71.8%	77.4%	82.2%
Greeting Cards	72.2%	90.9%	63.8%	78.3%	89.7%
Scratch and/or Bake-Off Bakery	62.1%	76.0%	65.7%	60.2%	79.4%
Courtesy Booth	59.4%	66.4%	44.9%	63.9%	92.8%
Postage Stamps	55.9%	82.3%	66.6%	78.4%	28.0%
Photo Service	45.8%	77.0%	61.2%	49.6%	51.6%
Video Rental	36.5%	55.4%	28.3%	34.2%	57.1%
Pharmacy	23.7%	27.1%	27.7%	25.9%	23.1%
Cosmetic Center	17.0%	32.2%	27.7%	20.3%	20.1%

STORE FORMAT INFORMATION

	Conventional Stores	Super Stores	Combination Stores	Warehouse Stores
Median Weekly Sales	$131,200	$298,850	$364,340	$319,045
Median Number of Checkouts	7	11	12	10
Median Sale per Customer Transaction	$17.13	$19.27	$19.48	$26.38
Median Weekly Sales per Sq.Ft. of Selling Area	$10.15	$10.80	$10.40	$9.57
Median Sales per Labor Hour	$98.35	$107.04	$101.06	$131.75
Median Total Size	20,015	41,500	50,900	43,000
Average Retail Price per Item	$1.73	$1.59	$1.69	$1.43
Average Number of Items Carried	15,800	22,850	27,814	16,090

Average Gross Margins for Five Year Periods

	Companies with Distribution Centers	Companies Without Distribution Centers
1985-1989	23.8%	22.3%
1980-1984	23.2%	21.2%
1975-1979	22.3%	20.1%
1970-1974	21.1%	19.2%
1965-1969	21.3%	19.3%

Customer Services

Because new customer services are so important in the supermarkets of the 1980s, this year's *Speaks* attempts to tie the level of services with various measures of growth and productivity. As shown in the table, a much higher percentage of stores in the companies in the top quartile of identical store sales growth offered certain services than stores overall. This is also true for stores in the top quartile of sales per square foot and sales per labor hour.

It is very important to note the effects of service departments on labor productivity. *Speaks* also looked at the number of services offered by those stores in the bottom quartile of sales per labor hour ($86.00 and below). As shown in the table, a higher percentage of stores in the bottom quartile offer services that other stores do not.

In summary, the data show that stores with more services often have higher overall growth, weekly sales volume and productivity. However, these services have a strong effect on the bottom line for labor productivity and those stores with the most services also have the lowest overall labor productivity numbers. Once again, it is important to realize that the numbers tell only part of the story. The fact overall sales per labor hour have not declined more than they did and, in fact, have remained steady for the past five years, is another testament to the resourcefulness of supermarket operators.

Gross Margin Trends

The typical gross margin for supermarket companies with their own distribution centers was 24.0 percent in 1989; for those without their own distribution centers, it was 23.4 percent. On average, gross margins have risen slightly over the past 20 years. (See accompanying table).

Because service departments, such as seafood, tend to have higher gross margins to cover higher labor costs, etc. the increased number of service departments may have contributed to the rise in gross margins. For example, respondents to this year's seafood department study reported a median gross margin of 30 percent for fresh seafood. The increase in non-food items has the same effect.

Another factor is the increased used of technology, such as computerized space management and Direct Product Profit (DPP)—developments that enable retailers to better manage their operations and product mix, thus achieving higher gross margins.

Trends in Labor Costs

Typical store level labor costs in 1989 were 11.2 percent of sales, or 8.8 percent for wages and salaries and 2.4 percent for fringe benefits. Store labor expenses have risen throughout the 1980s, driven by a rise in fringe benefit costs. Store wages and salaries averaged 8.6 percent in 1980-84 and 8.7 percent in 1985-89, only a 1.2 percent difference. An average of 2.3 percent of sales was spent on fringe benefits in 1985-89, compared with the 2.1 percent average for 1980-84.

Supermarket Financial Developments

When the decade began, runaway inflation and high interest rates caused the industry to spend 0.63 percent of its sales on interest payments, up from 0.19 percent in 1976. Net profit after tax and extraordinary items was 0.98 percent and the industry's debt-to-equity ratio was 66.28 percent.

The industry's financial picture improved as interest rates declined. It was relatively stable until the 1986-87 (April 1 to March 31) fiscal year, when the merger and acquisition mania began. The debt-to-equity ratio climbed from 63.14 percent in 1984-85 to 81.95 percent in 1988-89. Interest payments on debt amounted to 1.13 percent of annual sales in 1988-89, 117 percent higher than the 0.52 percent rate of 1984-85, the last year before the increase in mergers and acquisitions. Net profit peaked at 1.19 percent of annual sales in 1985-86, plummeting to 0.71 percent in 1988-89. Return on total assets, which reached 5.80 percent in 1985-86, slipped to 2.65 percent.

While profits were low, the small proportion of owner's equity was good news for investors. Return on owner's equity was up to 16.94 percent in 1988-89, the highest in the decade.

Customer Payment Methods

In 1989, cash transactions slightly outnumbered those paid by check in the companies surveyed (47 percent and 46 percent respectively). In 1986 the results were very similar with cash and check transactions equal at about 47 percent. About 5 percent of transactions were paid with food stamps.

Over 3 percent of the stores surveyed in 1989 accept credit cards for grocery items and almost 12 percent accept them for pharmaceutical items and/or non-foods. A much higher percentage of stores in companies with annual sales under $30 million allowed the use of credit cards.

A typical store accepted 2500 checks per week, with an average value of $50.00. By extrapolation, this totals $125,000 per week or about 65 percent of the median weekly store sales. Less than one percent of those checks (20) were returned for insufficient funds and four of those were written off as uncollectable. Each of the four had a median value of $58.70, or a total of $230.00, or 0.1 percent of weekly sales.

Technology

Almost 58 percent of the stores surveyed were scanning in 1989 and 60.2 percent of the companies in the sample had scanning in 100 percent of their stores. Scanning data were used most often for store labor: checker evaluation and labor scheduling.

Speaks also asked questions about other technologies. One quarter of the firms in this year's study used computerized space management. Almost 9 percent were using Direct Product Profit (DPP). Companies using DPP and/or computerized space management typically carried fewer items in their stores, indicating that these technologies have allowed them to better focus their merchandising strategies.

Operating Results in the 1980s

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Gross Margin For Firms With a Distribution Center	22.4%	23.0%	23.4%	23.7%	24.1%	24.0%	23.6%	23.9%	23.9%	24.0%
Gross Margin For Firms Without a Distribution Center	20.9%	20.9%	21.2%	21.5%	21.6%	22.3%	21.3%	22.6%	22.2%	23.4%
Store Labor Expense as a Percentage of Annual Sales	8.4%	8.5%	8.8%	8.8%	8.9%	8.6%	8.8%	8.6%	8.7%	8.8%
Store Fringe Expense as a Percentage of Annual Sales	1.9%	2.0%	2.1%	2.2%	2.3%	2.3%	2.2%	2.5%	2.3%	2.4%

Distribution Center Operations

EXTENT OF ENGINEERED LABOR STANDARDS

Percentage of Dry Grocery Centers with Standards in 1989	40.0%
Percentage of Dry Grocery Centers Planning Standards in 1990	12.3%
Percentage of Dry Grocery Centers Planning Standards in 1991	11.6%
Percentage of Dry Grocery Centers Planning Standards in 1992	11.2%
Percentage of Perishable Centers With Standards in 1989	38.8%
Percentage of Perishable Centers Planning Standards in 1990	12.3%
Percentage of Perishable Centers Planning Standards in 1991	10.1%
Percentage of Perishable Centers Planning Standards in 1992	10.1%

PERCENTAGE OF CENTERS USING THE FOLLOWING TECHNIQUES TO DEVELOP STANDARDS*

Time-Study/Stopwatch	55.8%
Pre-Determined Standards	40.5%
Both Time-Study/Stopwatch and Pre-Determined Standards	3.8%
Outside Consultants	63.5%
In-House With Computer Software	23.1%
In-house With Employee and Supervisor Input	38.5%
Union Input	8.7%

*Multiple Responses Accepted

This year's distribution center section of *Speaks* examined the role that engineered labor standards play in dry grocery centers. Based on two major variables, time and production, the standards are developed to improve and refine distribution operations on a scientific basis.

Generally, workers are expected to achieve a certain level of productivity over a certain period of time. Nearly 33 percent of the responding centers offer incentives to encourage workers to meet the standards: 97 percent offer extra pay and 61 percent offer time off.

Exactly 40 percent of the responding dry grocery centers had engineered labor standards in place last year. Respondents were also asked about their perishable distribution centers: almost 39 percent of those centers had standards in place.

Almost 90 percent of the responding centers with standards are conventionally operated, meaning that the orders for individual stores are selected and put together manually. The remainder are semi-automated that is, orders are selected from the warehouse manually and put onto conveyor belts to be sorted for individual store orders.

Use of engineered labor standards yielded productivity gains across the board. Overall productivity increased a median of 20 percent since the standards were implemented, with most falling between 13 percent and 30 percent.

Development of Standards

Standards have been in place for an average of 6.3 years. Regionally, 80 percent of the centers in New England and Middle Atlantic states have had standards for five years or more, and the average center in the Pacific region has had standards for 7.1 years. On the other hand, centers in the Southeast and West North Central areas were slower to implement standards having had them in place an average of 3.5 years and 3.9 years respectively. Engineered labor standards have been in place longer in conventional centers (averaging more than six years) than semi-automated ones (less than three years).

Two major techniques are used in developing engineered labor standards: over 55 percent of the responding centers used time studies with a stopwatch in the center itself; while 41 percent used "pre-determined standards." Expected performance levels are determined from studies conducted over many years in a variety of centers. In the latter method, a given task is broken down into the smallest units possible. The method determines the time needed for each of those units based on information in an existing data base. With the time-study method, standards are determined after a detailed study of each task as it is performed in a specific center.

A variety of partners help develop and implement labor standards, e.g., outside consultants, computer software, employees, supervisors and unions.

Generally, centers with standards in place an average of 5.5 or more years have made the greatest use of time studies and outside consultants. Pre-determined standards were most widely used in areas where standards were implemented more recently, such as the Southeast and West North Central regions.

Overall, just over 23 percent of the centers used computer software to develop the standards, and 39 percent accepted input from supervisors and employees. Again, these techniques were more prevalent where standards were developed within the last five years.

Unions and Standards

The data revealed some interesting differences between union and nonunion centers in standards development. Nearly 61 percent of the unionized centers used the time study/stopwatch method, while only 30 percent of nonunion centers did so, opting instead for predetermined standards (65 percent). Predetermined standards were used by 36 percent of centers with unions. Small percentages of both union and nonunion centers used both methods.

Over half (53 percent) of the nonunion centers developed their standards with employee and supervisor involvement, compared with only 36 percent of unionized centers. Nearly 65 percent of the unionized centers used outside consultants compared with just over 58 percent of those without unions. The union itself helped develop the standards in only 10 percent of the responding centers. Only 9 percent of the unionized centers had standards included in their union contracts.

PERCENTAGE OF CENTERS IMPLEMENTING STANDARDS IN THE FOLLOWING AREAS*

Receiving	49.0%
Put-Away and Replenishment	57.8%
Loading	52.9%
Selection	100.0%

*Multiple Responses Accepted

PERCENTAGE OF CENTERS USING STANDARDS FOR THE FOLLOWING*

Tracking Individual Productivity	100.0%
Tracking Area Productivity	67.6%
Tracking Shift Productivity	76.5%
Plan Shifts	63.7%

*Multiple Responses Accepted

Impact on Workers

All of the responding centers use standards to track individual productivity. Nearly 77 percent use them to track shift productivity and 64 percent to plan shifts. Area productivity was tracked by 68 percent of the centers.

All of the centers that responded said they use the standards for selection. Of great importance to the overall operations, selection activities are among the easiest to measure and therefore a natural place to implement standards. Fewer centers have applied the standards to activities other than selection. Almost half (49 percent) use them in receiving, 58 percent in put away and replenishment and 53 percent in loading.

Almost 88 percent of the centers use a training program for employees to help implement standards.

The standards were challenged by outside arbitration in 24 percent of the centers. Unionized facilities experienced a slightly higher rate of challenges that those without unions.

Supermarket Advertising

Ads and Ad Campaigns

Today's supermarket operators are focusing their marketing skills—and their advertising dollars—on consumers' taste for quality and variety according to data collected for the current *Speaks* study. This parallels what consumers care most about when selecting a store according to FMI's latest consumer research: quality produce and meat and good variety.

In 1989, over two-thirds of the companies surveyed ran ads emphasizing high quality in the meat and produce departments. Over 40 percent promoted a wide selection of products throughout the store. These themes were featured in individual "spot" ads, and total advertising campaigns.

Nutritious and healthy diets are also topics on the minds of many consumers, and 35 percent of the companies surveyed highlighted such themes in their ads. Almost 20 percent built entire campaigns around nutritional messages.

One in five operators (23 percent) used ads to address recent consumer concerns over food and product safety. Over 15 percent ran ads promoting products or packaging as environmentally safe and over 22 percent plan to do so in 1990.

Use of Media and Promotions

The media used in supermarket advertising appears to be changing if one looks at the components of a typical advertising budget. Since the late 1970s, FMI studies have revealed a trend toward greater use of direct mail, accounting in 1989 for some 27 percent of the budget. Still, the typical company spends about half of its budget on newspapers. The remainder goes to radio and television with a small percentage spent on in-store coupons and other forms of advertising. Data for the mid-1980s show more emphasis on in-store coupons and television than was found in the late 1980s and in the late 1970s, when FMI first began tracking this information.

TYPES OF ADS AND CAMPAIGNS
(percentage of companies using:)

	INDIVIDUAL ADS		CAMPAIGNS	
	Used in 1989	Planned for 1990	Used in 1989	Planned for 1990
Quality Produce/Produce Department	69.8%	60.0%	34.6%	32.7%
Quality Meats/Meat Department	67.8%	59.5%	33.7%	33.7%
Store Image	60.5%	52.2%	35.1%	33.7%
Low-Price/Price Promotion	54.1%	50.7%	28.3%	23.9%
Public Service	42.9%	38.5%	20.0%	16.6%
Good Variety/Wide Selection	41.0%	40.0%	22.0%	19.5%
Good Service	39.0%	36.1%	24.9%	24.9%
Nutrition/Health	35.1%	35.6%	19.0%	21.0%
Food and Product Safety	22.9%	23.9%	7.8%	9.3%
Environmentally Safe Products, Packaging, etc.	15.1%	22.4%	7.8%	10.2%

Many operators said they plan to significantly increase other forms of promotion in 1990. For example, just over one in 10 companies featured frequent shopper programs in 1989, and that number is expected to more than double in 1990. The use of electronic coupons may also double, from 7 percent in 1989 to 15 percent in 1990.

PERCENTAGE OF COMPANIES USING THE FOLLOWING TYPES OF ADVERTISING AND PROMOTIONS

	USED in 1989	PLANNED for 1990
Frequent Shopper Programs	11.2%	22.9%
Electronic Coupons	7.3%	15.1%
Marketing by Individual Store	25.9%	34.6%
Marketing by Store Cluster	19.5%	23.9%
Direct Mail	44.4%	51.7%

Just under half of the firms surveyed used pre-printed inserts in 1989, typically developing one insert each week. Four-color and two-color ads were used most often. Less than one-third featured black-and-white inserts and 40 percent used marriage mail, an insert that contains various ads from unrelated retailers.

About one-half of firms are using run-of-print ads (ROPs) which are advertisements that can appear anywhere in a newspaper as opposed to a pre-selected page. About 60 percent run them one day a week. However, a small group of companies, all under $250 million in sales, featured ROPs seven days a week.

Overall, 54 percent of the responding firms were advertising on radio and 41 percent on television. Radio and TV are not limited to larger companies: almost 34 percent of the independent firms in the study featured radio ads and 17 percent television.

Radio campaigns in the responding companies earned a median of 150 gross rating points per week, while television campaigns typically earned 300 gross rating points in a typical week.*

**Gross rating points (GRPs) are an index measuring the relative coverage of the ads in a given area. A rating of 100 means that all of the local households will see or hear a given commercial at least once during the week (some more times, some less). Thus, 300 GRPs means that all TV households saw the typical commercial three times in a given week.*

Advertising Budgets

Generally, firms are spending a median of 1.1 percent of their annual sales on advertising. Companies with more than 11 stores—and a separate advertising department—spent a slightly lower percentage than smaller firms.

Advertising budgets are somewhat difficult to compare because of different accounting procedures. For example, almost all the firms advertising on radio and television included air time in their budgets. Only 42 percent of the firms employing a separate advertising department included the salaries of advertising personnel in their budgets and only 25 percent included store coupons. Just over half of the firms said they include manufacturer co-op revenues in their budget which typically account for 10 percent of their advertising expense.

Measuring Advertising Results

Companies are evaluating the results of their advertising much more closely now than in past years. In 1989, almost all retailers said they study the direct effect of advertising on their sales, compared with only 78 percent in 1982, the last time FMI studied this aspect of advertising. Even more dramatic, many operators now study customer traffic, customer surveys and coupon redemption patterns to evaluate advertising. Only a handful of operators evaluated these data in 1982.

Finally, about one third of the companies said they use scanning and point-of-sale data to study the results of their advertising and promotions. Of those companies using scanning data, 22 percent did so for analysis of displays and/or ads, 17 percent for planning or goal setting and 17 percent for marketing by individual store.

PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING:

	1989	1983	1977
Newspaper	52.6%	42.1%	52.0%
Targeted Mailer/Flyer	27.4%	12.4%	16.1%
Radio	7.3%	12.8%	6.2%
Television	6.8%	10.8%	12.5%
In-Store Coupons	2.2%	14.9%	1.5%
Billboards	0.7%	0.6%	1.4%

PERCENTAGE OF COMPANIES USING SCANNING DATA FOR ADVERTISING PURPOSES

	USED in 1989	PLANNED for 1990
Display/Ad Analysis	21.5%	23.9%
Planning/Goal Setting	17.1%	20.5%
Marketing by Store Clusters	12.7%	18.5%
Frequent Shopper Programs	7.8%	14.1%
Marketing by Individual Store	16.6%	23.4%

PERCENTAGE OF COMPANIES USING THE FOLLOWING METHODS TO MEASURE THE EFFECTIVENESS OF ADVERTISING

	1989	1982
Sales	94%	78%
Customer Traffic	71%	12%
Coupon Redemption	63%	12%
Customer Reaction	50%	12%
Customer Surveys	43%	12%
Management Reaction	39%	3%
Scanning/POS Data	33%	–
Inventory Management	12%	14%

Activities of Advertising Departments

There were a few new developments in the procedures performed in ad departments since 1982. In-house computer graphics, a new technology since 1982, were used in just under half the companies. The same percentage had in-house printing capabilities, compared with 34 percent in 1982. Over half of those did printing right in their ad departments (typically, printing was limited to signs and smaller jobs). Almost nine in 10 had sign shops, seven in 10 had small printers, and four in 10 had larger sheet-fed printers. Only the largest companies invested in large web-fed printers.

Other data reveal little change from 1982 in the procedures of a typical advertising department. Almost seven out of every eight were designing black-and-white ads, and close to two-thirds were designing four-color ads in house as well. Just under half were involved in typesetting, script writing and the design and production of company newsletters. Only 28 percent produced their own radio commercials and 19 percent their own television commercials.

Seafood

The Seafood Environment

As Americans focus more on nutrition and the healthfulness of their diets, supermarket seafood departments are becoming increasingly popular and important.

Over half of the new stores studied in FMI's *Facts About Store Development, 1989* featured service seafood departments. This is in direct response to consumer demands. FMI's consumer research indicated that 63 percent consider the fresh seafood section as an important supermarket feature.

Seafood consumption per capita has reached about 15.5 pounds in 1989, up from 15 pounds in 1988 and up more than 22 percent since 1982. Thus, across the nation the demand for seafood is building as Americans become increasingly aware of the link between diet and health. Retailers will have to navigate troubled waters if the seafood department is to achieve its full potential. FMI seafood studies indicate that consumers are concerned about the safety of seafood. Over 70 percent of the respondents in a 1989 study done in conjunction with FMI's Seafood Merchandising Conference reported consumer questions regarding seafood safety. Retailers dealt with these questions several ways: 62 percent answered the questions in writing and 39 percent initiated positive advertising campaigns.

However, publicity on the lack of mandatory federal seafood inspection and incidents of water contamination such as the Alaskan oil spill are seen as shaking consumer confidence in the seafood supply.

In fact, 85.1 percent of the companies participating in the Speaks survey said seafood should be federally inspected, and some said they were buying with more attention to products inspected under the current voluntary inspection program. Clearly, the potential for further seafood growth remains, and most retailers are optimistic. Of the companies that responded, 91 percent predicted that seafood sales volume will continue to increase over the next few years.

The Seafood Department

Over half of the firms (53 percent) reported that their seafood departments serve primarily as a means of increasing traffic for the store as a whole, while 39 percent viewed this department as a profit center in its own right.

Almost all the stores surveyed (91.7 percent) carry frozen fish and a large majority (69.2 percent) also handle fresh fish. Other seafood products, including canned, dried and cured fish, were sold by 75.6 percent. New England and the Pacific region had the most stores with various types of seafood, consistent with trends identified in *Speaks* for the past 10 years.

Full-service seafood departments were offered by 47.5 percent of the responding stores in 1989. Over 40 percent operated separate seafood departments with their own managers and another 12 percent expected to have such a department in 1991.

Typical weekly seafood sales, for all stores were $4,500, accounting for about 2.3 percent of typical weekly store sales volume. In the seafood department fresh (as opposed to other types) seafood seems to be the biggest revenue-generator. Stores without fresh fish averaged only $400 a week in seafood sales.

Smaller companies (10 or fewer stores) were very active in seafood. Just over 82 percent carried fresh seafood compared with 69 percent of the larger firms. The percentage of stores with separate seafood departments varied little by company size: 37 percent of the smaller companies had a separate department compared with 41 percent of the larger ones. Typical weekly sales varied quite sharply by company size: one-store operators had a median of $1,550 a week per store in seafood sales, 2-10 store firms sold $3,000 and those with more than 10 stores generated $4,500. However, when viewed as a percentage of total weekly store sales, all groups reported approximately 2 percent.

The size of seafood departments may be stabilizing. Although the 1989 data show an increase in the median linear case footage devoted to seafood, compared with 1986, the middle 50 percent of the responses clustered much closer around the median than in 1986.

The size of the full-service seafood department did not change from 1986: a median of 16 linear feet was reported in both 1989 and 1986. Also, the size range seems to be narrowing, as 50 percent of the respondents in 1986 reported a range of between eight and 16 feet compared with 12 to 16 feet in 1989.

Seafood Employees

When asked about the biggest challenges facing seafood in the next five years, training and qualified people were ranked first by the greatest number of firms. Realizing this, 71 percent of the respondents said they provide special training for seafood department employees. Typically, they provide 20 hours of training for each new employee. Experienced employees receive 10 hours of training per year. Nearly half use video training tapes and self training materials (49 percent).

The typical seafood department had two full-time and three part-time employees.

Selection

By far the most popular seafood item for all responding companies is shrimp, with 61 percent reporting it as their number one seller. Shrimp was even more important in full-service seafood departments, being number one in 75 percent of these operations. Salmon was a distant second and catfish third, followed by orange roughy, cod and crabs.

While most retail buying habits for seafood have not changed in recent years, the most popular reason for changing was the need for more variety and better quality.

Looking specifically at finfish, a third said they changed their buying practices. Finding more/better suppliers was a key concern mentioned by over 19 percent of the respondents. Some companies added more vendors, while others went directly to the fish markets. Another popular change was to add more variety and/or different species, cited by 17 percent. Almost 13 percent said they were buying more fillets, and the same percentage were buying more fresh fish. Fifteen percent said they were placing more emphasis on quality in their finfish buying.

Nearly 19 percent of the companies changed their shellfish buying habits. Those that changed buying habits for frozen fish sought to obtain more quality. Another 17 percent cited more variety, while 15 percent said they were purchasing less frozen fish.

On the Farm

As 1990 began, there were excessive supplies of shrimp on the market, forcing prices down as domestic producers competed with their counterparts from abroad, particularly Asia. U.S. shrimp consumption is between 720 and 750 million pounds annually.

Aquaculture is becoming an increasingly important player in the fish industry, and catfish is one of the most popular species grown on fish farms.

Total annual production of catfish increased to 316 million pounds in November 1989, up from 272 million pounds at the same time in 1988. At the beginning of the decade, 46 million pounds of catfish were raised. The U.S. Department of Agriculture, however, reported that catfish farmers overproduced in 1989, causing retail catfish prices to decline by as much as 15 percent.

SEAFOOD STATISTICS

	MEDIAN	MIDDLE RANGE	
Weekly Seafood Sales per Store	$4500	$2700	$4850
Gross Margin — Total Seafood	25%	25%	31%
Gross Margin — Fresh Seafood	30%	28%	35%
Gross Margin — Frozen Seafood	28%	23%	35%
Linear Feet of Fresh Seafood Cases	16 Feet	12 Feet	16 Feet
Linear feet of Frozen Seafood Cases	8 Feet	8 Feet	18 Feet

DEPARTMENTS RECEIVING CREDIT FOR SEAFOOD SALES (percentage of stores in which the following departments receive credit for some or all seafood sales)

	1989	1984
Seafood Department	42.2%	50.2%
Meat Department	71.4%	87.6%
Other Department (Deli, etc.)	23.4%	9.0%

*Multiple responses accepted

Health Care

The dominant concern facing food distributors today is the cost of providing health care in an environment of labor shortages and skyrocketing insurance premiums.

Companies surveyed by FMI ranked health care well above all other issues, including labor shortages, substance abuse, solid waste and food safety.

Over half (52 percent) of the survey respondents identified health-care costs as their primary concern and 36 percent ranked it second. More than nine in 10 said health benefits are necessary to attract and keep workers.

More than four in five companies earmarked high costs as their most formidable health related problem, and almost half said overuse of health-care services only makes matters worse. Those concerns far outweigh such issues as quality of care.

Escalation of Health Costs
Health-care costs are skyrocketing among food distribution companies. Those surveyed said that health plan premiums for individual hourly workers increased an average of 20 percent from 1987 to 1989. Over the last two years, premiums increased 45 percent.

Small employers face the largest problem. In 1989, the premiums for food distributors with fewer than 100 employees increased an average of 27 percent compared with 16 percent for large employers (2,500 or more employees). Over three years, the increase for small firms averaged 65 percent, compared with 44 percent for large companies.

Food distributors' plan expenditures have continued to outpace those of other employers, according to comparative data collected by the Wyatt Company.* Though plan costs for food distributors have increased 45 percent since 1987 compared with 50 percent for other employers, actual expenditures have averaged 19 percent ($412 per plan) more each year than the actual expenditures of employers providing plans in other industries. An important factor may be the more limited use of cost containment and managed care approaches by food distributors.

Containing Health Care Costs
What are food distributors doing to contain their health-care costs? Respondents said the two most effective ways are to use managed care approaches and to shift a greater portion of the cost to employees. Introduction of wellness/health promotion programs was listed as third. Some type of national health insurance or universal health coverage program was indicated as the most effective by one in five respondents—primarily firms with fewer than 100 employees. The lack of a single, clear-cut solution to the cost-containment problem resembles the pattern in other industries.

Food distributors who use managed care and wellness/promotion programs to control health-care costs hope to reduce the need for care and limit inappropriate care. Cost-sharing arrangements aim to increase employee awareness of the rapid escalation of the cost of care. However, neither a universal health care system nor restrictions on provider compensation was seen as an effective way to contain costs.

Other industries make greater use of techniques to control inpatient hospitalization costs. For example, 47 percent of the grocers use precertification of inpatient days compared with 76 percent of employers in other industries. While half the employers in other industries have used hospital bill audits, only 28 percent of the FMI respondents do so. Food distributors use second surgical opinions as much as other industries. The same applies to outpatient facilities for non-surgical health care.

However, only half as many food distributors use outpatient surgical procedures. Only 22 percent use alternative settings, such as an HMO, compared with over half of other industry groups. Conversely, more food distributors use preferred-provider arrangements than employers in other industries.

Cost Sharing and Shifting
Respondents to the *Speaks* survey report a continued decline in the number of non-contributory health plans. In the last three years non-contributory family coverage plans have declined from one-quarter to one-fifth of food distributors—a trend comparable to other industries. Those requiring employee contributions for health coverage have increased from just over one-third to more than 40 percent of respondents in the same time period.

Among those requiring contributions, employee premiums for family health coverage have increased 38 percent over the last three years from, $756 to $1,044. Deductibles have gradually increased, from an average of $200 to $250 since 1987. Family out-of-pocket limits for medical expenses have increased from an average of $1,500 in 1987 to $1,700 in 1989.

Percentage of Food Distributors Rating the Following as the Most Serious Issues Facing Their Companies

Health-care costs	51.6%
Labor shortage	35.9%
Solid Waste	4.0%
Substance Abuse	2.7%
Food Safety	2.2%

**The comparative data are derived from Wyatt's study of food manufacturers and general wholesale/retail companies (e.g. department stores). Some food distributors were included in the sample.*

Average Cost Increases in Medical Premiums

1987 vs. 1986	15.2%
1988 vs. 1987	20.3%
1989 vs. 1988	24.0%

Health Care Cost Increases for Food Distributors, 1987–1989

All Retailers and Wholesalers	45%
Food Distributors with less than 100 employees	65%
Larger Food Distributors	44%

Percentage of Food Distributors Rating Each of the Following as the Most Effective Way to Control Health-Care Costs

Control utilization of medical services through managed care approaches	28.3%
Shift a greater amount of the cost burden to the employee	22.9%
Change employee attitude and behavior by wellness and prevention programs	22.0%
Introduce national health insurance or some other type of universal health-care system	17.9%
Cap health-care provider compensation	7.6%

Average Costs for Individual Hourly Employee Medical Plans

	1987	1988	1989
Average Monthly Premium	$ 93	$ 105	$ 124
Average Monthly Employee Contributions	$ 12	$ 15	$ 18
Average Deductible Amount	$ 141	$ 161	$ 169
Average Coinsurance Percentage	72.4%	72.1%	71.9%
Average Maximum Out-of-Pocket Expense Paid Before All Expenses are Paid by the Plan	$1206	$1152	$1315

Average Costs for Family Hourly Employee Medical Plans

	1987	1988	1989
Average Monthly Premium	$ 182	$ 211	$ 254
Average Monthly Employee Contributions	$ 39	$ 43	$ 56
Average Deductible Amount	$ 222	$ 268	$ 252
Average Coinsurance Percentage	74.0%	73.2%	73.5%
Average Maximum Out-of-Pocket Expense Paid Before All Expenses are Paid by the Plan	$1531	$1552	$1691

Focus of Health Care System

The study asked food distributors' opinions on the general American health-care system and what system they would prefer. Asked what the primary focus of the American health care system should be, the first choice was an emphasis on controlling costs of employer-provided care. While 43 percent said each citizen by law should be enrolled in an adequate health plan to cover catastrophic expenses, this factor was seen as secondary to keeping costs under control. Most viewed cost control as more important than providing universal access to health care.

Another important principle in the provision of health care is the preservation of the free marketplace. While 59 percent of the respondents said health-care costs must be controlled, one-quarter said this should not limit an individual's freedom to choose medical care providers.

Three of four respondents believe the individual is primarily responsible for obtaining health care. Only 8 percent indicated it was the employer's responsibility, and 16 percent said it should be the government's. The government should encourage competition and monitor the health market in the view of 60 percent.

Preferred System

Asked to identify how health care should be delivered, all but 3 percent said the choice of care or facilities should not be restricted by the government. Prices and fees should be based on the free marketplace, according to 53 percent. Less than one in five food distributors supported federal, state or local controls, or some type of intervention by insurance providers. Three in four said health facilities should be privately owned, while over four in five said health-care practitioners should be private, not employees of any government.

Universal Care

Survey respondents were asked to give their opinions on the implementation of universal health care. Slightly more than a third support tax-financing for universal health care with taxes on alcohol and tobacco. However, when asked about supporting a tax-financed universal health system owned or controlled by the government, the support dropped to 16 percent.

Minimal support was found for mandated employer-provided health benefits. Nearly half (49 percent) supported the use of tax incentives to encourage individuals to provide for their own long-term care, and 43 percent favored tax-free savings accounts to help purchase medical care. About one in four employers favored the introduction of government-provided health-care services.

Utilization of Selected Cost Containment Techniques Across Industries

	Food Distributors	Food Manufacturers	General Wholesale/Retail
Precertification of Hospital Stays	47%	76%	76%
Second Surgical Opinion	66%	63%	56%
HMO	22%	52%	56%
PPO	25%	14%	26%
Surgical Outpatient Care	45%	37%	52%
Outpatient Surgery	42%	82%	90%
Preadmission Testing	53%	73%	79%
Hospital Bill Audit	28%	45%	57%

Appendix

The Business Environment

The decade of the 1980s wound to a close with the general business climate for the food distribution industry remaining generally positive.

- Economic expansion continued its remarkable eight-year run in 1989, even as significant signs of a slow-down became evident.
- Regionally, economic differences became more pronounced through the latter half of the 1980s. Business cycles in various parts of the country were less synchronized with each other.
- Inflation rose to its highest level since 1981, pushed mostly by steep increases in energy and food prices earlier in the year.

Factors that continued to shape the economic environment included slow population growth, a high percentage of working women and a low unemployment rate.

Meanwhile, in addition to a slowing economy, the food industry is facing its continued high level of competition and such difficult challenges as solid waste management, consumer concern about food safety and rising health-care costs.

The Population

Changing social patterns also continue to pose challenges for food retailers.

As the nation's population growth slowed to less than 1 percent in 1989, it is clear that overall consumer growth is also slowing.

Last year, 74 percent of women aged 25-54 were in the workforce. In response, supermarkets increased the number of service departments, prepared foods and other offerings to provide more "one stop shopping" for these time-pressed consumers. Speciality foods and ethnic offerings reflected both regional concentrations and a more sophisticated and affluent consumer.

The Economy

The Gross National Product—the overall measure of the nation's economic health—posted a 2.9 percent increase in 1989. Overall growth in personal consumption, the biggest component of GNP, slowed to a 2.3 percent pace in 1989, down from 3.8 percent in 1988. Growth in real personal disposable income was 3.6 percent in 1989, close to the 4.0 percent pace in 1988. Retail sales overall rose 5 percent over 1988, the smallest rate of growth in seven years.

Americans spent 11.7 percent of their disposable income on food in 1989 according to the U.S. Department of Agriculture, down a full percentage point from 1984's 12.7 percent. The food-at-home portion was 7.3 percent, again a full percentage point below 1984. Food-away-from-home also declined slightly to 4.3 percent after holding steady at about 4.4 percent since 1984. These trends help underscore the unique position of the food distributor, particularly the food retailer. As disposable income increases, consumers do not generally eat more, although they may change some of their eating habits, for example, buying different products.

As the economy slowed, inflation began to climb, reaching its highest level since 1981. The 4.8 percent inflation rate as measured by the Consumer Price Index (CPI) was fueled mainly by higher food and energy costs. Consumer food and energy prices rose sharply in the early part of the year, owing to the 1988 drought and higher oil prices. Later in the year, the situation in both the agricultural and energy markets improved considerably. On an annual basis, costs for all food increased 5.8 percent in 1989. Costs for food-at-home rose an even steeper 6.5 percent. Excluding energy and food, inflation rose only 4.2 percent, a slight decline from the 1988 figure excluding food and energy.

Changes in the Producer Price Index (PPI) were also dominated by developments in food and energy markets. During the first quarter, prices for finished foods jumped 13.1 percent at an annual rate, following a 5.7 percent rise in 1988. These striking increases stemmed from the even larger 14.2 percent increases in unfinished foods during 1988 and 16.9 percent increases during the first quarter of 1989 as the 1988 drought curtailed food supplies.

The government reported that employers generally faced higher labor costs, propelled by climbing health-care expenses. Although total pay and benefit costs rose 4.8 percent in 1989, this was the first year since 1986 that costs rose less than the previous year. Labor compensation costs consist of wages and salaries and benefits. The wages and salaries component rose moderately from 3.1 percent in 1986 to 4.2 percent in 1989. The increase in benefits costs rose more sharply, from 3.4 percent in 1986 to 6.8 percent in 1988, and declined slightly to 6.1 percent in 1989. The U.S. government reports that nearly all of the acceleration in benefit costs can be traced to rising health insurance premiums.

The average prime rate charged by banks climbed to 10.9 percent in 1989 compared with 9.3 percent the year before, a change resulting from monetary policies aimed at keeping inflation in check in the early part of the year.

Food Production and Consumption Trends

Growing consumer concerns with nutrition and food safety are tipping the scales of supply and demand throughout the supermarket industry. For example, beef and egg production have dropped significantly, while poultry production has soared, because health-conscious consumers perceive poultry as a low-fat, low-cholesterol alternative.

Although the fresh vegetable industry is introducing labels such as "organic," "low-input" and "natural" to try to boost consumer confidence in fresh fruits and vegetables, recent food safety scares have shaken the customer's faith in these products.

Other factors, such as changes in the weather and in personal income, are also causing shifts in food production and consumption.

Citrus fruit production, for example, dropped by more than 10 percent last year. Though some of this decline may be related to food safety concerns, the severely cold winter provides a more likely explanation. Freezes in December and February depleted the citrus crop and forced prices up.

Here's how the balance of supply and demand is changing for specific supermarket products:

Beef and Eggs—Consumers cut back by about three pounds of beef and eight eggs per person last year. In response, suppliers cut beef production by about 1 percent and egg production by 3 percent. Egg production has been flat, or declining, throughout the 1980s.

Poultry—As the economy leaves more disposable income in the pockets of shoppers, they're choosing more expensive meats, such as turkey, and more expensive cuts, like broilers.

During the 1980s, broiler consumption rose from 42 pounds to 65 pounds per person, and production increased by more than 50 percent. Over the last five years, consumers bought about six more turkeys per person, and last year alone turkey production increased by about 6 percent.

Vegetables—USDA officials said that consumer demand for vegetables increased in 1989, and production rose by about 15 percent.

Methodology

The *Food Marketing Industry Speaks, 1990*, is based on data derived from several annual studies conducted by the Food Marketing Institute. The *Speaks* project for 1990 consists of six separate surveys: supermarket operations, distribution center operations, wholesale operations, supermarket advertising, seafood departments, and health-care issues. Supermarket and wholesale/distribution center operations are studied annually. Other topics are selected based on current needs and issues in the industry. Questionnaires were directed to selected executives in firms with 20 or more stores and to the CEOs of those firms with fewer than 20 stores.

The sample in the annual survey varies somewhat from year to year, especially among the smaller firms so direct comparability is not entirely possible. Some of the year-to-year changes in supermarket productivity and operations figures may partially reflect a change in companies responding to the survey. However, we believe that the conclusions drawn from the *Speaks* surveys provide an accurate picture of the general trends in the food distribution industry and serve as a valid indicator of the industry's response to the myriad forces in the environment in which it operates.

Data from other FMI studies are included in the *Speaks* report when applicable, including *Facts About Store Development, Annual Financial Review*, and *Operations Review*.

FMI defines a supermarket as a retail food store with annual sales of at least $2 million.

The complete results of all the *Speaks* surveys can be found in a separate publication, the *Detailed Tabulations from the Food Marketing Industry Speaks, 1990*. Data are delineated by annual company sales, geographic region and other breakouts as appropriate. Copies of the survey instruments are also included.

Unless otherwise noted, all data in the *Speaks* study are medians. The median represents the midpoint for figures in a particular measure, with one-half the figures in an individual measure above it and one-half below it. In calculating the median, the individual data are weighted by the number of stores or annual company sales where applicable. The median is used as an indicator of "typical" performance because it is not distorted by a few unusually high or low values that may exist in the sample due to special circumstances.

In analyzing the data and comparing it with individual company performance, it is also important to consider the "middle range." This represents the middle 50 percent of the responses, indicating that half the responses fell between two points, namely the upper and lower quartiles (see graph on the bottom of p. 18).

Speaks 1990 also delineates many data in the supermarket operations section by those firms in top quartile, middle range and bottom quartile of identical store sales growth, sales per square foot and sales per labor hour. This allows the reader to examine results for the most successful firms in a given area of productivity.

When measuring real growth in sales or productivity, FMI uses the food-at-home component of the CPI to deflate dollar figures and its annual percentage increase to deflate percentage growth figures. The Bureau of Labor Statistics now uses 1982-84 dollars as a base figure for deflation. The CPI food-at-home number for 1989 is 124.2 with 100 = 1982-84, based on an average figure for the 36 months in that period. For example, to deflate the 1989 average sales per labor hour (see page 5.) one divides the current number ($100.50) by the 1989 food-at-home number (124.2) and then multiplies that result by 100: ($100.50/124.2) × 100 = $80.92 "real sales per labor hour." To deflate a percentage, such as the 1990 retail sales growth (p. 4), add one to the current dollar number (1 + .065) and then multiply this by the inverse of the 1989 food-at-home percentage change plus one (1/1.065). The result is 1.000 or 0.0 percent. The table on this page charts the CPI food-at-home index and the percentage increase for the past 10 years.

Index for Deflating FMI Data*

	CPI Food at Home	% Increase
1980	88.4	8.0%
1981	94.8	7.3%
1982	98.1	3.4%
1983	99.1	1.1%
1984	102.8	3.7%
1985	104.3	1.4%
1986	107.3	2.9%
1987	111.9	4.3%
1988	116.6	4.2%
1989	124.2	6.5%

*1982-1984 Dollars

SAMPLE DESCRIPTION FOR THE FOOD MARKETING INDUSTRY SPEAKS, 1990

Supermarket Operations

(Base) Company Retail Sales (millions)	Sample Companies (191)
Under $10	35.4%
$10-$30	17.2%
$31-$100	14.6%
$101-$250	8.7%
$251-$500	5.7%
$500-$1000	4.7%
$1001-$3000	8.4%
Over $3000	4.7%

Distribution Center Operations

(Base) Company Type	Sample Companies (92)	Sample Centers (284)
Retailers	45.7%	35.6%
Cooperative Wholesalers	12.0%	6.7%
Voluntary Wholesalers	14.1%	27.5%
Unaffiliated Wholesalers	8.7%	4.2%
Combined Retailer/Wholesaler	19.6%	26.1%

Supermarket Advertising

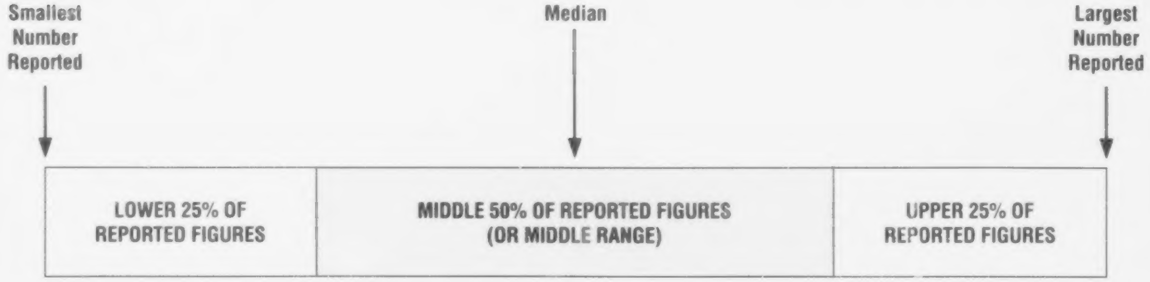
(Base) Company Retail Sales (millions)	Sample Companies (205)
Under $10	33.2%
$10-$30	22.0%
$31-$100	10.7%
$101-$250	10.2%
$251-$500	5.4%
$501-$1000	6.8%
$1001-$3000	7.3%
Over $3000	4.4%

Seafood Departments

(Base) Company Retail Sales (millions)	Sample Companies (175)
Under $10	22.9%
$10-$30	30.3%
$31-$100	14.3%
$101-$250	14.9%
$251-$500	4.0%
$501-$1000	5.7%
$1001-$3000	4.6%
Over $3000	3.4%

Health Care

(Base) Company Type of Company	Sample Companies (223)
1 Store Companies	33.3%
2—10 Store Companies	35.1%
11—49 Store Companies	9.7%
50+ Store Companies	14.9%
Wholesalers	7.0%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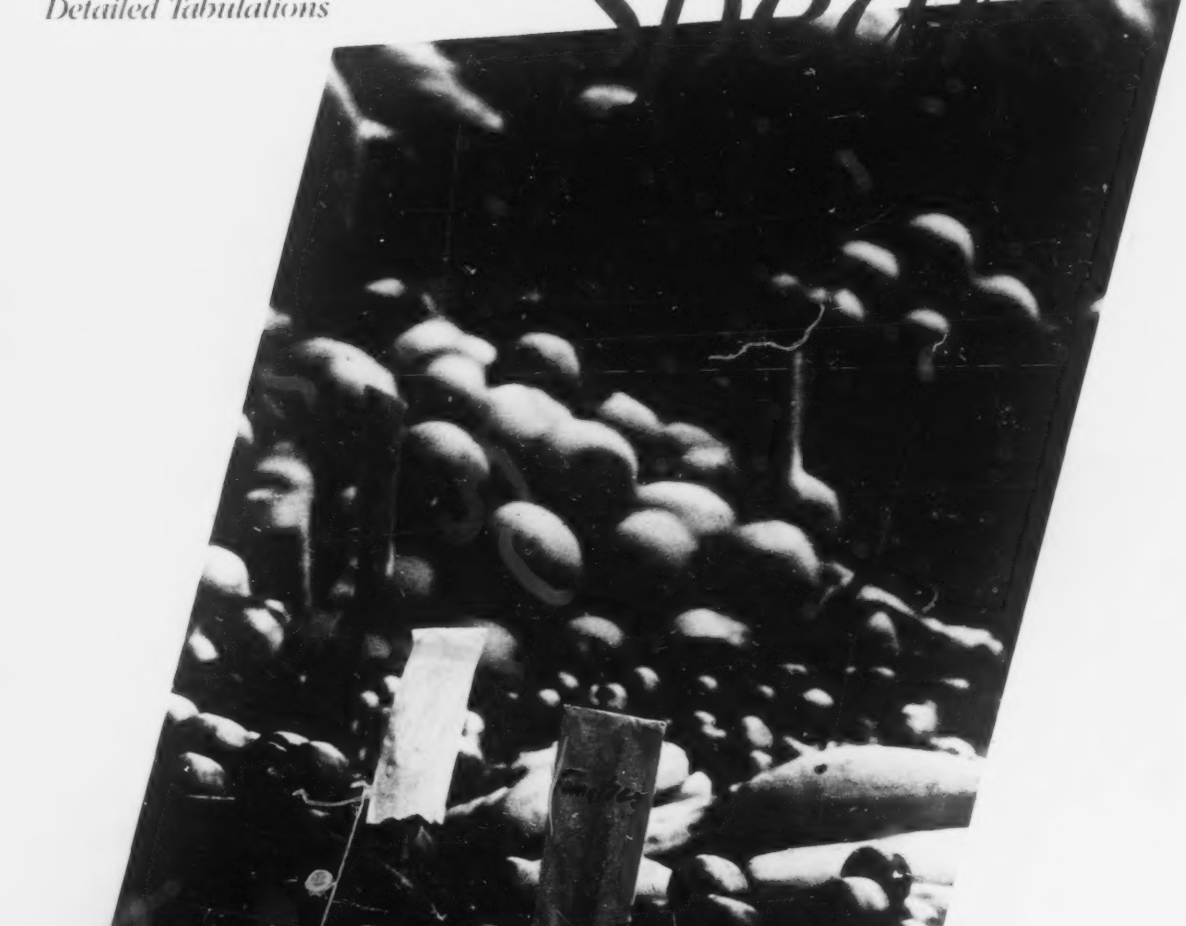

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Published by:
The Research Department
Food Marketing Institute
1750 K Street, NW
Washington, DC 20006

Price:
Food Marketing Industry Speaks, 1990
FMI Members: $20.00
Nonmembers: $40.00
Washington, DC 20006

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Industry Speaks, 1990
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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members — food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion — more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 210 members from over 55 nations.

FOREWORD

This publication is the companion report to *The Food Marketing Industry Speaks, 1990.* It contains the detailed tabulations for the information summarized in that report.

An annual survey of food wholesalers and retailers is the primary source of information for this report. Any data not taken from FMI's Speaks surveys are indicated by a footnote.

Data are for 1989. Company sales data are reported on an annual basis; productivity data, e.g. sales per labor hour, square foot or transaction, are reported on a weekly basis.

Except where noted, the term average is used to indicate mean figures. All other figures are medians. A median represents the halfway or middle figure when all figures are listed in order from smallest to largest. Data are presented only when four or more companies in category answered the question, except for distribution centers when it is three or more.

Speaks studies supermarket operations, wholesale operations, and distribution centers on an annual basis. Other topics are examined based on the current needs of the industry. Subject areas explored in depth this year are seafood, health care, supermarket advertising, and distribution center operations.

Data for store profiles are found in Tables 18A and 18B. In these tables, sales and productivity figures are presented for four different types of grocery stores: conventional stores, superstores, combination stores, and warehouse stores.

In order to insure confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

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TABLE 1A
PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	192	69	33	28	16	11	9	17	9
1 STORE OPERATORS	40.6%	89.9%	45.5%	3.6%	-	-	-	-	-
2 - 10 STORE COMPANIES	25.0	10.1	51.5	71.4	18.8	-	-	-	11.1
11 - 49 STORE COMPANIES	15.6	-	3.0	25.0	75.0	81.8	11.1	-	-
50 + STORE COMPANIES	18.8	-	-	-	6.3	18.2	88.9	100.0	88.9
INDEPENDENTS (1 - 10 STORES)	65.6	100.0	97.0	75.0	18.8	-	-	-	11.1
CHAINS (11 + STORES)	34.4	-	3.0	25.0	81.3	100.0	100.0	100.0	88.9

TABLE 1B
PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	192	14	24	52	19	24	9	12	22	16
1 STORE OPERATORS	40.6%	50.0%	50.0%	51.9%	47.4%	33.3%	44.4%	33.3%	31.8%	-
2 - 10 STORE COMPANIES	25.0	21.4	20.8	25.0	10.5	25.0	33.3	33.3	40.9	18.8
11 - 49 STORE COMPANIES	15.6	7.1	16.7	19.2	26.3	12.5	11.1	16.7	9.1	12.5
50 + STORE COMPANIES	18.8	21.4	12.5	3.8	15.8	29.2	11.1	16.7	18.2	68.8
INDEPENDENTS (1 - 10 STORES)	65.6	71.4	70.8	76.9	57.9	58.3	77.8	66.7	72.7	18.8
CHAINS (11 + STORES)	34.4	28.6	29.2	23.1	42.1	41.7	22.2	33.3	27.3	81.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 1C
PROFILE OF RESPONDENTS -- RETAIL SALES IN 1989

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	192	78	48	30	36	126	66
UNDER $10 MILLION	35.9%	79.5%	14.6%	-	-	54.8%	-
$10 - $30 MILLION	17.2	19.2	35.4	3.3	-	25.4	1.5
$31 - $100 MILLION	14.6	1.3	41.7	23.3	-	16.7	10.6
$101 - $250 MILLION	8.3	-	6.3	40.0	2.8	2.4	19.7
$251 - $500 MILLION	5.7	-	-	30.0	5.6	-	16.7
$501 - $1 BILLION	4.7	-	-	3.3	22.2	-	13.6
$1 BILLION - $3 BILLION	8.9	-	-	-	47.2	-	25.8
OVER $3 BILLION	4.7	-	2.1	-	22.2	.8	12.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 2A
MEDIAN PERCENTAGE CHANGE IN RETAIL SALES, 1988 VS. 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	6.5%	2.3%	11.4%	183
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	5.1	0	9.4	64
$10 - $30	6.0	3.9	12.3	32
$31 - $100	6.3	3.3	11.4	27
$101 - $250	11.0	4.8	16.8	16
$251 - $500	6.5	.5	11.1	11
$501 - $1 BILLION	5.2	2.6	8.9	8
$1 BILLION - $3 BILLION	9.2	5.6	13.3	16
OVER $3 BILLION	8.8	7.1	9.9	9
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	10.6	3.7	14.2	14
MID ATLANTIC	7.1	4.5	9.5	22
EAST NORTH CENTRAL	5.9	.5	13.4	51
WEST NORTH CENTRAL	6.4	5.1	10.3	18
SOUTHEAST	4.1	1.8	8.8	23
WEST SOUTH CENTRAL	5.3	0	9.5	9
MOUNTAIN	2.4	-2.6	11.9	12
PACIFIC	7.2	3.7	14.5	20
CANADA	8.5	1.8	11.4	14
NUMBER OF STORES				
1 STORE	6.0	0	10.0	75
2 - 10 STORES	6.6	3.5	12.8	44
11 - 49 STORES	6.1	.5	11.4	30
50 + STORES	8.7	4.1	12.3	34

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 2B
LEVELS OF ANNUAL SALES GROWTH

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
MEDIAN ANNUAL SALES GROWTH	6.5%	5.1%	6.0%	6.3%	11.0%	6.5%	5.2%	9.2%	8.8%
PERCENTAGE OF COMPANIES WITH ANNUAL SALES GROWTH IN THE FOLLOWING CATAGORIES									
UNDER 2.5%	25.7	34.4	18.8	22.2	18.8	36.4	25.0	18.8	11.1
2.5% TO 4.9%	14.2	15.6	15.6	18.5	6.3	9.1	25.0	6.3	11.1
5.0% TO 7.4%	17.5	15.6	25.0	22.2	12.5	18.2	12.5	6.3	22.2
7.5% TO 9.9%	12.6	10.9	6.3	11.1	6.3	9.1	25.0	25.0	33.3
10.0 TO 12.4%	8.2	4.7	12.5	3.7	18.8	9.1	12.5	6.3	11.1
12.5 AND ABOVE	21.9	18.8	21.9	22.2	37.5	18.2	-	37.5	11.1

TABLE 2C
LEVELS OF ANNUAL SALES GROWTH

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
MEDIAN ANNUAL SALES GROWTH	6.5%	6.0%	6.6%	6.1%	8.7%	6.0%	7.6%
PERCENTAGE OF COMPANIES WITH ANNUAL SALES GROWTH IN THE FOLLOWING CATAGORIES							
UNDER 2.5%	25.7	30.7	20.5	26.7	20.6	26.9	23.4
2.5% TO 4.9%	14.2	13.3	20.5	13.3	8.8	16.0	10.9
5.0% TO 7.4%	17.5	20.0	15.9	20.0	11.8	18.5	15.6
7.5% TO 9.9%	12.6	9.3	15.9	3.3	23.5	11.8	14.1
10.0 TO 12.4%	8.2	8.0	2.3	13.3	11.8	5.9	12.5
12.5 AND ABOVE	21.9	18.7	25.0	23.3	23.5	21.0	23.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 2D

LEVELS OF ANNUAL SALES GROWTH

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
MEDIAN ANNUAL SALES GROWTH	6.5%	10.6%	7.1%	5.9%	6.4%	4.1%	5.3%	2.4%	7.2%	8.5%
PERCENTAGE OF COMPANIES WITH ANNUAL SALES GROWTH IN THE FOLLOWING CATAGORIES										
UNDER 2.5%	25.7	14.3	13.6	29.4	11.1	26.1	44.4	50.0	20.0	35.7
2.5% TO 4.9%	14.2	21.4	18.2	13.7	11.1	26.1	-	8.3	10.0	7.1
5.0% TO 7.4%	17.5	-	18.2	21.6	38.9	8.7	22.2	8.3	25.0	-
7.5% TO 9.9%	12.6	7.1	27.3	5.9	11.1	21.7	22.2	8.3	-	21.4
10.0 TO 12.4%	8.2	21.4	13.6	2.0	16.7	-	-	-	15.0	14.3
12.5 AND ABOVE	21.9	35.7	9.1	27.5	11.1	17.4	11.1	25.0	30.0	21.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 3A
MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES, 1988 VS. 1989 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	5.3%	1.3%	9.1%	175
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	4.8	0	9.1	65
$10 - $30	5.6	3.3	11.7	32
$31 - $100	4.3	2.5	6.7	25
$101 - $250	7.8	3.6	15.8	15
$251 - $500	2.5	.5	5.6	9
$501 - $1 BILLION	4.2	.4	5.3	8
$1 BILLION - $3 BILLION	5.5	2.8	6.9	15
OVER $3 BILLION	5.4	2.1	7.4	6
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	6.9	3.7	11.1	13
MID ATLANTIC	5.0	2.5	7.7	21
EAST NORTH CENTRAL	5.4	0	9.7	48
WEST NORTH CENTRAL	6.3	3.6	10.3	18
SOUTHEAST	4.0	.3	7.4	23
WEST SOUTH CENTRAL	5.3	0	9.5	9
MOUNTAIN	1.3	-3.6	7.3	11
PACIFIC	5.2	3.0	10.0	19
CANADA	4.1	1.4	8.6	13
NUMBER OF STORES				
1 STORE	6.0	0	10.0	75
2 - 10 STORES	5.6	1.6	9.9	43
11 - 49 STORES	3.6	.5	7.6	27
50 + STORES	5.2	2.8	6.9	30

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENITRE TWO-YEAR PERIOD OF 1988-1989

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 3B

MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES 1988 VS. 1989 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	5.3%	1.3%	9.1%	175
BOTTOM IDENTICAL STORE GROWTH	-1.5	-4.0	0	44
MIDDLE RANGE IDENTICAL STORE GROWTH	5.3	3.6	6.7	88
TOP IDENTICAL STORE GROWTH	13.6	10.5	20.4	43
1 STORE OPERATORS				
TOTAL	6.0	0	10.0	75
BOTTOM IDENTICAL STORE GROWTH	-2.7	-4.5	0	21
MIDDLE RANGE IDENTICAL STORE GROWTH	6.0	4.0	7.3	33
TOP IDENTICAL STORE GROWTH	14.3	11.4	20.7	21
2 - 10 STORE COMPANIES				
TOTAL	5.6	1.6	9.9	43
BOTTOM IDENTICAL STORE GROWTH	-1.6	-4.8	0	9
MIDDLE RANGE IDENTICAL STORE GROWTH	5.3	4.0	6.7	23
TOP IDENTICAL STORE GROWTH	16.0	12.3	19.1	11
11 - 49 STORE COMPANIES				
TOTAL	3.6	.5	7.6	27
BOTTOM IDENTICAL STORE GROWTH	-1.3	-2.6	.5	9
MIDDLE RANGE IDENTICAL STORE GROWTH	4.1	3.2	5.3	13
TOP IDENTICAL STORE GROWTH	15.8	12.1	29.4	5
50 + STORE COMPANIES				
TOTAL	5.2	2.8	6.9	30
BOTTOM IDENTICAL STORE GROWTH	-.4	-.6	.1	5
MIDDLE RANGE IDENTICAL STORE GROWTH	5.0	3.4	6.4	19
TOP IDENTICAL STORE GROWTH	10.0	9.5	11.1	6

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL REPSONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 3C
LEVELS OF IDENTICAL STORE SALES GROWTH

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
MEDIAN IDENTICAL STORE SALES GROWTH	5.3%	4.8%	5.6%	4.3%	7.8%	2.5%	4.2%	5.5%	5.4%
PERCENTAGE OF COMPANIES WITH IDENTICAL STORE SALES GROWTH IN THE FOLLOWING CATAGORIES									
UNDER 2.5%	29.7	35.4	21.9	24.0	20.0	55.6	37.5	20.0	33.3
2.5% TO 4.9%	18.3	15.4	15.6	32.0	13.3	-	25.0	26.7	16.7
5.0% TO 7.4%	20.6	15.4	25.0	24.0	6.7	22.2	25.0	33.3	33.3
7.5% TO 9.9%	9.7	10.8	6.3	4.0	20.0	11.1	12.5	6.7	16.7
10.0 TO 12.4%	7.4	4.6	12.5	4.0	13.3	11.1	-	13.3	-
12.5 AND ABOVE	14.3	18.5	18.8	12.0	26.7	-	-	-	-

TABLE 3D
LEVELS OF IDENTICAL STORE SALES GROWTH

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
MEDIAN IDENTICAL STORE SALES GROWTH	5.3%	6.0%	5.6%	3.6%	5.2%	5.7%	4.1%
PERCENTAGE OF COMPANIES WITH IDENTICAL STORE SALES GROWTH IN THE FOLLOWING CATAGORIES							
UNDER 2.5%	29.7	30.7	27.9	37.0	23.3	29.7	29.8
2.5% TO 4.9%	18.3	13.3	16.3	29.6	23.3	14.4	26.3
5.0% TO 7.4%	20.6	20.0	20.9	7.4	33.3	20.3	21.1
7.5% TO 9.9%	9.7	9.3	11.6	7.4	10.0	10.2	8.8
10.0 TO 12.4%	7.4	8.0	4.7	7.4	10.0	6.8	8.8
12.5 AND ABOVE	14.3	18.7	18.6	11.1	-	18.6	5.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 3E
LEVELS OF IDENTICAL STORE SALES GROWTH

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
MEDIAN IDENTICAL STORE SALES GROWTH	5.3%	6.9%	5.0%	5.4%	6.3%	4.0%	5.3%	1.3%	5.3%	4.1%
PERCENTAGE OF COMPANIES WITH IDENTICAL STORE SALES GROWTH IN THE FOLLOWING CATAGORIES										
UNDER 2.5%	29.7	7.7	28.6	35.4	16.7	30.4	44.4	54.5	21.1	30.8
2.5% TO 4.9%	18.3	30.8	19.0	12.5	16.7	30.4	-	-	26.3	23.1
5.0% TO 7.4%	20.6	15.4	19.0	18.8	27.8	17.4	22.2	27.3	26.3	15.4
7.5% TO 9.9%	9.7	7.7	19.0	8.3	11.1	8.7	22.2	-	-	15.4
10.0 TO 12.4%	7.4	15.4	4.8	4.2	22.2	4.3	-	-	15.8	-
12.5 AND ABOVE	14.3	23.1	9.5	20.8	5.6	8.7	11.1	18.2	10.5	15.4

TABLE 4A
AVERAGE PERCENTAGE OF OPERATION SUPPLIED BY:

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	175	65	30	24	16	11	8	15	6
OWN WAREHOUSE	57.7%	10.6%	11.8%	17.7%	34.6%	45.4%	60.3%	69.6%	55.3%
VOLUNTARY WHOLESALER	13.9	29.5	29.7	8.2	11.5	0	3.3	1.2	22.5
COOPERATIVE WHOLESALER	1.8	19.5	19.4	30.8	11.7	6.7	7.5	.3	0
UNAFFILIATED WHOLESALER	2.0	10.1	8.8	15.0	8.5	20.9	0	2.2	0
DIRECT VENDOR DELIVERIES	24.6	30.3	30.3	28.3	33.8	27.0	28.9	26.8	22.2

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 4B
AVERAGE PERCENTAGE OF OPERATION SUPPLIED BY:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	175	75	40	30	30	115	60
OWN WAREHOUSE	57.7%	9.7%	1.1%	35.4%	72.5%	1.4%	69.6%
VOLUNTARY WHOLESALER	13.9	28.1	73.3	5.2	1.5	71.7	1.8
COOPERATIVE WHOLESALER	1.8	24.3	3.1	15.9	.1	3.8	1.3
UNAFFILIATED WHOLESALER	2.0	8.1	1.3	15.5	.9	1.6	2.1
DIRECT VENDOR DELIVERIES	24.6	29.8	21.3	28.1	25.0	21.6	25.2

TABLE 4C
AVERAGE PERCENTAGE OF OPERATION SUPPLIED BY:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	175	14	21	50	18	22	7	12	18	13
OWN WAREHOUSE	57.7%	22.3%	52.3%	45.0%	52.2%	75.0%	79.0%	59.2%	73.1%	65.1%
VOLUNTARY WHOLESALER	13.9	57.0	.8	7.9	11.9	2.0	1.9	4.4	.2	1.9
COOPERATIVE WHOLESALER	1.8	.1	12.4	9.0	1.0	.1	3.2	2.0	1.6	0
UNAFFILIATED WHOLESALER	2.0	.3	5.9	9.0	1.5	3.1	.1	1.0	2.3	.3
DIRECT VENDOR DELIVERIES	24.6	20.3	28.6	29.1	33.5	19.9	15.8	33.4	22.9	32.7

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 5A

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	10.0%	9.0%	16.4%	167
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	8.1	5.3	12.0	62
$10 - $30	7.0	5.2	10.1	29
$31 - $100	8.0	5.0	11.7	23
$101 - $250	9.6	5.0	11.8	15
$251 - $500	12.2	8.4	18.5	10
$501 - $1 BILLION	9.0	5.8	11.1	8
$1 BILLION - $3 BILLION	12.9	9.5	16.4	15
OVER $3 BILLION	9.9	10.0	19.2	5
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	12.9	9.0	12.9	11
MID ATLANTIC	9.5	9.5	9.8	20
EAST NORTH CENTRAL	11.1	9.0	18.5	48
WEST NORTH CENTRAL	12.4	10.0	13.6	19
SOUTHEAST	6.4	6.4	17.0	20
WEST SOUTH CENTRAL	19.7	19.7	19.7	8
MOUNTAIN	20.5	20.5	20.5	10
PACIFIC	10.2	10.0	10.5	19
CANADA	10.3	9.0	16.4	12
NUMBER OF STORES				
1 STORE	8.0	6.0	11.8	71
2 - 10 STORES	8.0	5.0	10.5	40
11 - 49 STORES	9.0	7.0	18.1	26
50 + STORES	10.0	9.5	16.4	30

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 5B
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	10.0%	9.0%	16.4%	167
BOTTOM IDENTICAL STORE GROWTH	13.3	9.0	16.4	40
MIDDLE RANGE IDENTICAL STORE GROWTH	10.5	6.6	19.2	78
TOP IDENTICAL STORE GROWTH	13.6	10.0	19.7	40
1 STORE OPERATORS				
TOTAL	8.0	6.0	11.8	71
BOTTOM IDENTICAL STORE GROWTH	6.9	4.0	20.0	20
MIDDLE RANGE IDENTICAL STORE GROWTH	8.0	6.0	11.8	28
TOP IDENTICAL STORE GROWTH	9.0	6.2	11.0	20
2 - 10 STORE COMPANIES				
TOTAL	8.0	5.0	10.5	40
BOTTOM IDENTICAL STORE GROWTH	10.0	10.0	10.0	8
MIDDLE RANGE IDENTICAL STORE GROWTH	7.3	4.8	11.7	21
TOP IDENTICAL STORE GROWTH	6.5	5.0	10.0	9
11 - 49 STORE COMPANIES				
TOTAL	9.0	7.0	18.1	26
BOTTOM IDENTICAL STORE GROWTH	14.7	7.0	18.5	8
MIDDLE RANGE IDENTICAL STORE GROWTH	9.3	7.0	24.3	10
TOP IDENTICAL STORE GROWTH	5.7	5.0	9.0	5
50 + STORE COMPANIES				
TOTAL	10.0	9.5	16.4	30
BOTTOM IDENTICAL STORE GROWTH	14.9	9.0	16.4	4
MIDDLE RANGE IDENTICAL STORE GROWTH	10.5	6.6	19.2	19
TOP IDENTICAL STORE GROWTH	13.6	10.0	19.7	6

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL REPSONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 5C

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	10.0%	9.0%	16.4%	167
BOTTOM SALES PER SQUARE FOOT	6.4	6.4	9.3	56
MIDDLE RANGE SALES PER SQUARE FOOT	14.0	9.5	20.5	34
TOP SALES PER SQUARE FOOT	12.9	10.0	18.5	64
1 STORE OPERATORS				
TOTAL	8.0	6.0	11.8	71
BOTTOM SALES PER SQUARE FOOT	7.5	6.0	11.0	24
MIDDLE RANGE SALES PER SQUARE FOOT	6.2	3.5	8.0	16
TOP SALES PER SQUARE FOOT	8.9	6.0	12.0	26
2 - 10 STORE COMPANIES				
TOTAL	8.0	5.0	10.5	40
BOTTOM SALES PER SQUARE FOOT	10.0	6.0	11.7	15
MIDDLE RANGE SALES PER SQUARE FOOT	5.0	5.0	7.3	4
TOP SALES PER SQUARE FOOT	6.5	3.5	11.8	16
11 - 49 STORE COMPANIES				
TOTAL	9.0	7.0	18.1	26
BOTTOM SALES PER SQUARE FOOT	12.4	9.5	18.1	11
MIDDLE RANGE SALES PER SQUARE FOOT	24.3	5.0	24.3	4
TOP SALES PER SQUARE FOOT	7.0	7.0	9.0	10
50 + STORE COMPANIES				
TOTAL	10.0	9.5	16.4	30
BOTTOM SALES PER SQUARE FOOT	6.4	6.4	9.0	6
MIDDLE RANGE SALES PER SQUARE FOOT	14.9	9.5	20.5	10
TOP SALES PER SQUARE FOOT	12.9	10.5	19.2	12

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL REPSONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 5D

PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS	10.0%	8.1%	7.0%	8.0%	9.6%	12.2%	9.0%	12.9%	10.0%
PERCENTAGE OF COMPANIES WITH THE PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE									
UNDER 2.5%	.2	1.3	11.9	5.3	-	-	-	-	-
2.5% TO 4.9%	1.7	18.5	6.7	18.7	6.4	-	13.8	-	-
5.0% TO 7.4%	16.8	18.3	37.1	25.0	28.8	18.4	22.7	3.9	23.1
7.5% TO 9.9%	12.4	21.0	4.7	10.9	18.0	30.3	28.3	24.4	-
10.0 TO 12.4%	31.3	17.4	25.1	21.9	22.0	18.0	10.7	11.9	49.9
12.5 AND ABOVE	37.6	23.5	14.5	18.2	24.8	33.3	24.5	59.8	27.0

TABLE 5E

PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS	10.0%	8.0%	8.0%	9.0%	10.0%	8.0%	10.0%
PERCENTAGE OF COMPANIES WITH THE PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE							
UNDER 2.5%	.2	.8	7.3	-	-	5.6	-
2.5% TO 4.9%	1.7	12.8	14.7	3.1	1.2	14.2	1.4
5.0% TO 7.4%	16.8	30.2	25.7	35.4	15.1	26.8	16.6
7.5% TO 9.9%	12.4	15.0	3.9	20.9	12.0	6.7	12.6
10.0 TO 12.4%	31.3	23.8	40.6	5.6	33.1	36.4	31.2
12.5 AND ABOVE	37.6	17.3	7.8	35.1	38.6	10.2	38.3

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 5F

PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS	10.0%	12.9%	9.5%	11.1%	12.4%	6.4%	19.7%	20.5%	10.0%	10.3%
PERCENTAGE OF COMPANIES WITH THE PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE										
UNDER 2.5%	.2	1.0	1.1	.1	-	.1	-	-	-	-
2.5% TO 4.9%	1.7	-	.4	3.3	4.2	.7	-	-	.2	8.1
5.0% TO 7.4%	16.8	1.4	22.0	15.6	2.6	60.4	2.5	.1	.3	11.8
7.5% TO 9.9%	12.4	35.2	66.5	18.5	.3	7.8	-	7.4	.6	17.7
10.0 TO 12.4%	31.3	.4	4.0	26.4	46.4	3.2	.7	.7	82.9	15.1
12.5 AND ABOVE	37.6	62.0	6.1	36.0	46.5	27.8	96.8	91.9	16.0	47.3

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 6

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY HEALTH AND BEAUTY CARE PRODUCTS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.9%	3.3%	0%	122
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	3.0	2.0	4.2	52
$10 - $30	3.0	2.0	4.3	20
$31 - $100	3.6	2.1	6.0	16
$101 - $250	3.4	3.1	3.7	7
$251 - $500	3.7	3.2	4.7	5
$501 - $1 BILLION	3.0	2.0	3.5	6
$1 BILLION - $3 BILLION	4.8	3.5	5.3	12
OVER $3 BILLION	6.9	3.3	7.0	4
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	5.1	4.5	5.1	10
MID ATLANTIC	4.9	4.9	4.9	16
EAST NORTH CENTRAL	3.3	3.2	3.6	33
WEST NORTH CENTRAL	2.5	1.2	4.0	15
SOUTHEAST	3.3	3.3	5.3	15
WEST SOUTH CENTRAL	7.0	7.0	7.0	6
MOUNTAIN	7.0	7.0	7.0	6
PACIFIC	6.9	6.9	6.9	14
CANADA	3.5	2.3	4.4	7
NUMBER OF STORES				
1 STORE	3.5	2.2	6.0	60
2 - 10 STORES	3.6	2.1	3.7	23
11 - 49 STORES	3.2	3.0	5.5	15
50 + STORES	4.7	3.3	7.0	24

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 7

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY TOBACCO

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	2.5%	2.0%	3.5%	114
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	3.0	1.3	4.7	49
$10 - $30	1.5	1.0	2.5	18
$31 - $100	2.2	1.0	5.9	14
$101 - $250	3.5	1.6	8.0	7
$251 - $500	3.5	2.0	6.9	5
$501 - $1 BILLION	2.8	2.0	3.3	5
$1 BILLION - $3 BILLION	2.5	2.0	4.0	13
OVER $3 BILLION				3
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	2.2	2.0	2.2	9
MID ATLANTIC	3.4	3.4	3.4	16
EAST NORTH CENTRAL	3.6	2.0	4.0	28
WEST NORTH CENTRAL	2.5	.3	3.3	16
SOUTHEAST	1.7	1.7	4.0	14
WEST SOUTH CENTRAL	2.0	2.0	2.0	6
MOUNTAIN	3.5	3.5	3.5	5
PACIFIC	.1	.1	2.3	13
CANADA	4.8	3.6	7.6	7
NUMBER OF STORES				
1 STORE	2.1	1.0	3.8	57
2 - 10 STORES	1.6	1.0	2.0	19
11 - 49 STORES	3.5	1.0	5.9	15
50 + STORES	2.5	2.0	3.5	23

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 8

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY OTHER NON-FOODS (EXCLUDING HBC AND TOBACCO)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.7%	3.1%	9.5%	115
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1.8	1.0	8.0	48
$10 - $30	2.0	1.5	4.5	17
$31 - $100	1.8	1.0	3.9	15
$101 - $250	2.1	1.8	4.7	6
$251 - $500	3.6	2.1	3.6	5
$501 - $1 BILLION	4.7	3.0	5.0	6
$1 BILLION - $3 BILLION	5.6	2.5	9.5	14
OVER $3 BILLION	3.5	3.1	10.0	4
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	5.6	2.5	5.6	10
MID ATLANTIC	1.2	1.2	1.7	12
EAST NORTH CENTRAL	3.8	3.0	4.4	29
WEST NORTH CENTRAL	5.0	4.7	10.4	15
SOUTHEAST	3.1	3.1	8.8	15
WEST SOUTH CENTRAL	10.7	10.7	10.7	6
MOUNTAIN	10.0	10.0	10.0	6
PACIFIC	3.5	3.5	11.9	14
CANADA	4.0	1.9	8.8	8
NUMBER OF STORES				
1 STORE	2.1	1.5	4.0	54
2 - 10 STORES	4.4	1.0	4.7	21
11 - 49 STORES	3.0	1.8	3.9	14
50 + STORES	5.0	3.1	9.5	26

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 9A
MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$193500	$148580	$267000	10330
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	99788	66476	139286	79
$10 - $30	146978	120000	223000	75
$31 - $100	96807	90000	180500	207
$101 - $250	163593	58650	254440	282
$251 - $500	183394	159260	257000	339
$501 - $1 BILLION	154000	148580	227565	703
$1 BILLION - $3 BILLION	183425	121965	312400	2576
OVER $3 BILLION	250000	173900	267000	6069
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	472243	355191	479914	286
MID ATLANTIC	173900	173900	183425	1734
EAST NORTH CENTRAL	267000	267000	267000	1554
WEST NORTH CENTRAL	219144	189697	227565	388
SOUTHEAST	141862	141862	154500	1993
WEST SOUTH CENTRAL	312400	312400	312400	196
MOUNTAIN	272856	272856	272856	632
PACIFIC	250000	250000	278000	1747
CANADA	147999	80837	193477	1800
NUMBER OF STORES				
1 STORE	122000	83000	170000	77
2 - 10 STORES	167000	120000	234000	186
11 - 49 STORES	189697	133333	274279	583
50 + STORES	193477	154000	267000	9484

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 9B

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES				
TOTAL	$193500	$148580	$267000	10330
BOTTOM IDENTICAL STORE GROWTH	173900	154000	173900	2449
MIDDLE RANGE IDENTICAL STORE GROWTH	171913	141862	272856	4229
TOP IDENTICAL STORE GROWTH	225732	160000	312400	718
1 STORE OPERATORS				
TOTAL	122000	83000	170000	77
BOTTOM IDENTICAL STORE GROWTH	84567	49714	139286	21
MIDDLE RANGE IDENTICAL STORE GROWTH	127270	100757	193375	32
TOP IDENTICAL STORE GROWTH	124083	78850	200000	21
2 - 10 STORE COMPANIES				
TOTAL	167000	120000	234000	186
BOTTOM IDENTICAL STORE GROWTH	84100	74954	192307	45
MIDDLE RANGE IDENTICAL STORE GROWTH	180000	130000	234000	76
TOP IDENTICAL STORE GROWTH	187000	160000	328013	48
11 - 49 STORE COMPANIES				
TOTAL	189697	133333	274279	583
BOTTOM IDENTICAL STORE GROWTH	217000	159260	274279	226
MIDDLE RANGE IDENTICAL STORE GROWTH	146978	91660	189697	214
TOP IDENTICAL STORE GROWTH	269450	124128	282000	87
50 + STORE COMPANIES				
TOTAL	193477	154000	267000	9484
BOTTOM IDENTICAL STORE GROWTH	173900	154000	173900	2157
MIDDLE RANGE IDENTICAL STORE GROWTH	171913	141862	272856	3907
TOP IDENTICAL STORE GROWTH	223354	219144	312400	562

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL REPSONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 10A

MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$100.50	$86.00	$103.00	9333
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	79.49	68.52	89.60	66
$10 - $30	86.00	75.00	86.00	46
$31 - $100	87.00	80.00	95.00	174
$101 - $250	87.97	79.05	121.18	258
$251 - $500	80.90	77.98	91.07	315
$501 - $1 BILLION	93.50	90.65	100.51	703
$1 BILLION - $3 BILLION	104.20	91.90	111.63	1937
OVER $3 BILLION	101.43	86.00	103.00	5834
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	104.20	102.09	104.20	200
MID ATLANTIC	101.43	101.43	101.43	1733
EAST NORTH CENTRAL	86.00	86.00	86.00	1532
WEST NORTH CENTRAL	86.04	83.13	87.00	329
SOUTHEAST	78.30	78.30	91.07	1957
WEST SOUTH CENTRAL	83.12	83.12	83.12	194
MOUNTAIN	102.11	102.11	102.11	595
PACIFIC	103.00	103.00	118.00	1736
CANADA	98.35	93.50	110.08	1057
NUMBER OF STORES				
1 STORE	78.71	68.52	90.00	62
2 - 10 STORES	87.85	75.00	100.28	144
11 - 49 STORES	87.97	80.00	99.55	517
50 + STORES	101.43	86.00	103.00	8610

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 10B
MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$100.50	$86.00	$103.00	9333
BOTTOM IDENTICAL STORE GROWTH	101.43	101.43	101.43	1907
MIDDLE RANGE IDENTICAL STORE GROWTH	98.35	78.30	111.63	4196
TOP IDENTICAL STORE GROWTH	83.13	83.12	86.04	615
1 STORE OPERATORS				
TOTAL	78.71	68.52	90.00	62
BOTTOM IDENTICAL STORE GROWTH	75.00	66.77	83.00	17
MIDDLE RANGE IDENTICAL STORE GROWTH	82.10	70.28	98.00	26
TOP IDENTICAL STORE GROWTH	77.50	70.00	85.19	17
2 - 10 STORE COMPANIES				
TOTAL	87.85	75.00	100.28	144
BOTTOM IDENTICAL STORE GROWTH	82.99	69.80	86.71	36
MIDDLE RANGE IDENTICAL STORE GROWTH	85.00	80.00	104.21	63
TOP IDENTICAL STORE GROWTH	95.00	75.00	131.75	35
11 - 49 STORE COMPANIES				
TOTAL	87.97	80.00	99.55	517
BOTTOM IDENTICAL STORE GROWTH	87.97	85.53	102.36	202
MIDDLE RANGE IDENTICAL STORE GROWTH	87.00	78.40	95.28	200
TOP IDENTICAL STORE GROWTH	121.18	69.67	131.75	59
50 + STORE COMPANIES				
TOTAL	101.43	86.00	103.00	8610
BOTTOM IDENTICAL STORE GROWTH	101.43	101.43	101.43	1652
MIDDLE RANGE IDENTICAL STORE GROWTH	98.35	78.30	111.63	3907
TOP IDENTICAL STORE GROWTH	83.13	83.12	83.13	504

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL REPSONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 10C

MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$100.50	$86.00	$103.00	9333
BOTTOM AVERAGE WEEKLY SALES	78.30	78.30	93.50	2058
MIDDLE RANGE AVERAGE WEEKLY SALES	101.43	100.51	103.00	4146
TOP AVERAGE WEEKLY SALES	90.65	86.00	104.20	3117
1 STORE OPERATORS				
TOTAL	78.71	68.52	90.00	62
BOTTOM AVERAGE WEEKLY SALES	75.00	65.14	83.71	42
MIDDLE RANGE AVERAGE WEEKLY SALES	86.50	77.50	97.00	13
TOP AVERAGE WEEKLY SALES	113.72	82.51	117.00	6
2 - 10 STORE COMPANIES				
TOTAL	87.85	75.00	100.28	144
BOTTOM AVERAGE WEEKLY SALES	82.06	70.00	89.00	50
MIDDLE RANGE AVERAGE WEEKLY SALES	95.00	80.00	103.76	79
TOP AVERAGE WEEKLY SALES	131.75	113.50	131.75	15
11 - 49 STORE COMPANIES				
TOTAL	87.97	80.00	99.55	517
BOTTOM AVERAGE WEEKLY SALES	87.00	86.00	87.36	109
MIDDLE RANGE AVERAGE WEEKLY SALES	90.47	80.00	96.00	249
TOP AVERAGE WEEKLY SALES	99.55	79.20	102.36	148
50 + STORE COMPANIES				
TOTAL	101.43	86.00	103.00	8610
BOTTOM AVERAGE WEEKLY SALES	78.30	78.30	93.50	1857
MIDDLE RANGE AVERAGE WEEKLY SALES	101.43	101.43	103.00	3805
TOP AVERAGE WEEKLY SALES	90.65	86.00	104.20	2948

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 10D

MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$100.50	$86.00	$103.00	9333
BOTTOM SALES PER SQ. FT.	78.30	78.30	87.36	2179
MIDDLE RANGE SALES PER SQ. FT.	101.43	86.00	102.11	4358
TOP SALES PER SQ. FT.	104.20	83.13	118.00	1610
1 STORE OPERATORS				
TOTAL	78.71	68.52	90.00	62
BOTTOM SALES PER SQ. FT.	72.50	68.52	80.00	22
MIDDLE RANGE SALES PER SQ. FT.	77.95	64.00	87.50	12
TOP SALES PER SQ. FT.	85.00	72.00	104.35	25
2 - 10 STORE COMPANIES				
TOTAL	87.85	75.00	100.28	144
BOTTOM SALES PER SQ. FT.	80.00	69.80	95.00	55
MIDDLE RANGE SALES PER SQ. FT.	131.75	104.21	131.75	21
TOP SALES PER SQ. FT.	86.71	80.00	103.76	57
11 - 49 STORE COMPANIES				
TOTAL	87.97	80.00	99.55	517
BOTTOM SALES PER SQ. FT.	87.97	86.00	91.18	227
MIDDLE RANGE SALES PER SQ. FT.	77.98	77.98	121.18	81
TOP SALES PER SQ. FT.	93.06	79.20	99.55	177
50 + STORE COMPANIES				
TOTAL	101.43	86.00	103.00	8610
BOTTOM SALES PER SQ. FT.	78.30	78.30	87.00	1875
MIDDLE RANGE SALES PER SQ. FT.	101.43	86.00	102.11	4244
TOP SALES PER SQ. FT.	104.20	86.36	118.00	1351

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 11A

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$9.45	$8.18	$10.20	8845
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	8.87	6.36	11.70	66
$10 - $30	7.53	7.02	11.90	67
$31 - $100	6.10	5.20	10.50	204
$101 - $250	7.57	7.57	10.20	254
$251 - $500	7.04	5.10	9.64	339
$501 - $1 BILLION	8.50	8.43	9.91	703
$1 BILLION - $3 BILLION	10.36	9.57	10.79	2518
OVER $3 BILLION	8.99	4.67	9.40	4694
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	16.22	15.23	16.22	281
MID ATLANTIC	8.99	8.99	9.86	1734
EAST NORTH CENTRAL	9.38	9.35	9.47	1552
WEST NORTH CENTRAL	12.48	8.48	12.48	306
SOUTHEAST	4.67	4.67	7.13	1986
WEST SOUTH CENTRAL	10.79	10.79	10.79	195
MOUNTAIN	9.77	9.69	9.85	631
PACIFIC	11.64	11.56	11.72	595
CANADA	9.57	9.19	10.36	1565
NUMBER OF STORES				
1 STORE	9.36	7.02	13.59	71
2 - 10 STORES	9.41	6.29	12.00	161
11 - 49 STORES	8.32	5.65	11.06	562
50 + STORES	9.35	8.50	9.86	8051

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 11B

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$9.45	$8.18	$10.20	8845
BOTTOM IDENTICAL STORE GROWTH	8.99	8.99	9.19	2437
MIDDLE RANGE IDENTICAL STORE GROWTH	9.77	4.67	10.49	4196
TOP IDENTICAL STORE GROWTH	10.79	8.48	11.50	658
1 STORE OPERATORS				
TOTAL	9.36	7.02	13.59	71
BOTTOM IDENTICAL STORE GROWTH	8.56	5.75	10.70	20
MIDDLE RANGE IDENTICAL STORE GROWTH	10.00	7.84	13.59	29
TOP IDENTICAL STORE GROWTH	9.36	6.60	14.70	19
2 - 10 STORE COMPANIES				
TOTAL	9.41	6.29	12.00	161
BOTTOM IDENTICAL STORE GROWTH	6.33	5.06	12.00	34
MIDDLE RANGE IDENTICAL STORE GROWTH	10.33	7.20	15.15	67
TOP IDENTICAL STORE GROWTH	9.09	6.95	9.95	48
11 - 49 STORE COMPANIES				
TOTAL	8.32	5.65	11.06	562
BOTTOM IDENTICAL STORE GROWTH	5.92	5.10	11.06	226
MIDDLE RANGE IDENTICAL STORE GROWTH	8.32	5.78	9.64	193
TOP IDENTICAL STORE GROWTH	10.20	10.12	10.67	87
50 + STORE COMPANIES				
TOTAL	9.35	8.50	9.86	8051
BOTTOM IDENTICAL STORE GROWTH	8.99	8.99	9.19	2157
MIDDLE RANGE IDENTICAL STORE GROWTH	9.77	4.67	10.49	3907
TOP IDENTICAL STORE GROWTH	10.79	7.57	12.48	504

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES.

BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 11C

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$9.45	$8.18	$10.20	8845
BOTTOM AVERAGE WEEKLY SALES	5.00	4.67	9.78	2625
MIDDLE RANGE AVERAGE WEEKLY SALES	8.99	8.90	9.19	2993
TOP AVERAGE WEEKLY SALES	9.77	9.40	11.64	3226
1 STORE OPERATORS				
TOTAL	9.36	7.02	13.59	71
BOTTOM AVERAGE WEEKLY SALES	8.71	6.33	11.70	47
MIDDLE RANGE AVERAGE WEEKLY SALES	9.41	7.84	14.70	15
TOP AVERAGE WEEKLY SALES	13.83	11.35	19.56	8
2 - 10 STORE COMPANIES				
TOTAL	9.41	6.29	12.00	161
BOTTOM AVERAGE WEEKLY SALES	6.68	5.06	11.50	54
MIDDLE RANGE AVERAGE WEEKLY SALES	10.33	6.95	12.44	85
TOP AVERAGE WEEKLY SALES	9.41	9.09	12.67	22
11 - 49 STORE COMPANIES				
TOTAL	8.32	5.65	11.06	562
BOTTOM AVERAGE WEEKLY SALES	6.77	5.20	8.32	162
MIDDLE RANGE AVERAGE WEEKLY SALES	6.50	5.65	9.64	228
TOP AVERAGE WEEKLY SALES	11.31	10.39	13.55	172
50 + STORE COMPANIES				
TOTAL	9.35	8.50	9.86	8051
BOTTOM AVERAGE WEEKLY SALES	4.67	4.67	9.78	2362
MIDDLE RANGE AVERAGE WEEKLY SALES	8.99	8.99	9.19	2665
TOP AVERAGE WEEKLY SALES	9.77	9.40	11.64	3024

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 11D
MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$9.45	$8.18	$10.20	8845
BOTTOM SALES PER LABOR HOUR	9.40	4.67	9.40	3210
MIDDLE RANGE SALES PER LABOR HOUR	8.99	8.99	9.77	3317
TOP SALES PER LABOR HOUR	10.40	9.19	11.98	1620
1 STORE OPERATORS				
TOTAL	9.36	7.02	13.59	71
BOTTOM SALES PER LABOR HOUR	9.17	6.60	12.41	41
MIDDLE RANGE SALES PER LABOR HOUR	10.00	7.53	11.70	9
TOP SALES PER LABOR HOUR	19.02	11.54	20.10	9
2 - 10 STORE COMPANIES				
TOTAL	9.41	6.29	12.00	161
BOTTOM SALES PER LABOR HOUR	7.75	5.06	10.50	62
MIDDLE RANGE SALES PER LABOR HOUR	6.95	6.10	12.44	37
TOP SALES PER LABOR HOUR	12.00	9.09	18.85	34
11 - 49 STORE COMPANIES				
TOTAL	8.32	5.65	11.06	562
BOTTOM SALES PER LABOR HOUR	9.64	8.07	11.06	198
MIDDLE RANGE SALES PER LABOR HOUR	5.96	5.65	13.55	225
TOP SALES PER LABOR HOUR	8.48	6.27	10.12	62
50 + STORE COMPANIES				
TOTAL	9.35	8.50	9.86	8051
BOTTOM SALES PER LABOR HOUR	9.40	4.67	9.40	2909
MIDDLE RANGE SALES PER LABOR HOUR	8.99	8.99	9.77	3046
TOP SALES PER LABOR HOUR	10.40	9.86	11.98	1515

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 12A

MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	35000	23980	41900	10343
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	16730	14000	22000	78
$10 - $30	25000	20000	30500	72
$31 - $100	22000	18500	27250	213
$101 - $250	25000	10000	38727	293
$251 - $500	31170	26000	43000	339
$501 - $1 BILLION	34354	25000	37042	703
$1 BILLION - $3 BILLION	28000	16500	41892	2576
OVER $3 BILLION	37000	24000	41900	6069
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	41892	41892	50000	285
MID ATLANTIC	20000	20000	23980	1745
EAST NORTH CENTRAL	47789	47789	47789	1558
WEST NORTH CENTRAL	48015	35650	49500	388
SOUTHEAST	35000	35000	35000	1993
WEST SOUTH CENTRAL	38800	38800	38800	195
MOUNTAIN	41900	41900	41900	632
PACIFIC	37000	37000	37000	1747
CANADA	20650	7039	30605	1800
NUMBER OF STORES				
1 STORE	18350	14420	25488	76
2 - 10 STORES	27000	21000	35000	189
11 - 49 STORES	28000	25000	39500	594
50 + STORES	36000	23980	41900	9484

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 12B
MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	35000	23980	41900	10343
BOTTOM IDENTICAL STORE GROWTH	20000	20000	20650	2448
MIDDLE RANGE IDENTICAL STORE GROWTH	35000	24000	41892	4238
TOP IDENTICAL STORE GROWTH	38800	25000	49500	713
1 STORE OPERATORS				
TOTAL	18350	14420	25488	76
BOTTOM IDENTICAL STORE GROWTH	15250	10400	23500	20
MIDDLE RANGE IDENTICAL STORE GROWTH	17700	15000	24850	32
TOP IDENTICAL STORE GROWTH	20625	14440	25000	21
2 - 10 STORE COMPANIES				
TOTAL	27000	21000	35000	189
BOTTOM IDENTICAL STORE GROWTH	21000	20000	33000	45
MIDDLE RANGE IDENTICAL STORE GROWTH	27250	22900	35000	74
TOP IDENTICAL STORE GROWTH	25000	24000	50000	43
11 - 49 STORE COMPANIES				
TOTAL	28000	25000	39500	594
BOTTOM IDENTICAL STORE GROWTH	40803	28000	100000	226
MIDDLE RANGE IDENTICAL STORE GROWTH	25000	20000	28000	225
TOP IDENTICAL STORE GROWTH	25000	18321	42000	87
50 STORE COMPANIES				
TOTAL	36000	23980	41900	9484
BOTTOM IDENTICAL STORE GROWTH	20000	20000	20000	2157
MIDDLE RANGE IDENTICAL STORE GROWTH	35000	25000	41900	3907
TOP IDENTICAL STORE GROWTH	38800	35650	49500	562

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 12C

MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	35000	23980	41900	10343
BOTTOM AVERAGE WEEKLY SALES	25000	12000	35000	2645
MIDDLE RANGE AVERAGE WEEKLY SALES	30605	20000	37000	4150
TOP AVERAGE WEEKLY SALES	43464	38800	47789	3526
1 STORE OPERATORS				
TOTAL	18350	14420	25488	76
BOTTOM AVERAGE WEEKLY SALES	15000	11000	20000	51
MIDDLE RANGE AVERAGE WEEKLY SALES	23500	18500	31500	16
TOP AVERAGE WEEKLY SALES	36500	30500	47500	8
2 - 10 STORE COMPANIES				
TOTAL	27000	21000	35000	189
BOTTOM AVERAGE WEEKLY SALES	20000	19000	22900	70
MIDDLE RANGE AVERAGE WEEKLY SALES	27250	24000	33000	80
TOP AVERAGE WEEKLY SALES	55000	45500	55000	29
11 - 49 STORE COMPANIES				
TOTAL	28000	25000	39500	594
BOTTOM AVERAGE WEEKLY SALES	18500	17041	24000	162
MIDDLE RANGE AVERAGE WEEKLY SALES	35000	29473	43000	249
TOP AVERAGE WEEKLY SALES	35000	28000	40803	172
50 + STORE COMPANIES				
TOTAL	36000	23980	41900	9484
BOTTOM AVERAGE WEEKLY SALES	35000	10000	35000	2362
MIDDLE RANGE AVERAGE WEEKLY SALES	30605	20000	37000	3805
TOP AVERAGE WEEKLY SALES	43464	38800	47789	3317

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 12D

MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	35000	23980	41900	10343
BOTTOM SALES PER SQ. FT.	35000	31170	35000	2238
MIDDLE RANGE SALES PER SQ. FT.	29473	20000	47789	4368
TOP SALES PER SQ. FT.	35000	18321	43464	2232
1 STORE OPERATORS				
TOTAL	18350	14420	25488	76
BOTTOM SALES PER SQ. FT.	16500	11000	23000	27
MIDDLE RANGE SALES PER SQ. FT.	17980	13125	23500	16
TOP SALES PER SQ. FT.	20313	14750	28950	28
2 - 10 STORE COMPANIES				
TOTAL	27000	21000	35000	189
BOTTOM SALES PER SQ. FT.	24000	21000	29000	60
MIDDLE RANGE SALES PER SQ. FT.	50000	18000	55000	27
TOP SALES PER SQ. FT.	25500	22000	35000	67
11 - 49 STORE COMPANIES				
TOTAL	28000	25000	39500	594
BOTTOM SALES PER SQ. FT.	35000	25000	43000	276
MIDDLE RANGE SALES PER SQ. FT.	29473	25000	29473	81
TOP SALES PER SQ. FT.	28000	25500	35000	205
50 + STORE COMPANIES				
TOTAL	36000	23980	41900	9484
BOTTOM SALES PER SQ. FT.	35000	34800	35300	1875
MIDDLE RANGE SALES PER SQ. FT.	30605	20000	47789	4244
TOP SALES PER SQ. FT.	38800	7039	43464	1932

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 12E

MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	35000	23980	41900	10343
BOTTOM SALES PER LABOR HOUR	38800	35000	47789	3212
MIDDLE RANGE SALES PER LABOR HOUR	25000	20000	37042	3342
TOP SALES PER LABOR HOUR	37000	24000	37000	2772
1 STORE OPERATORS				
TOTAL	18350	14420	25488	76
BOTTOM SALES PER LABOR HOUR	16500	13000	22000	43
MIDDLE RANGE SALES PER LABOR HOUR	15500	15000	23000	9
TOP SALES PER LABOR HOUR	28700	20000	38000	10
2 - 10 STORE COMPANIES				
TOTAL	27000	21000	35000	189
BOTTOM SALES PER LABOR HOUR	24831	21000	33000	62
MIDDLE RANGE SALES PER LABOR HOUR	24000	20000	29000	41
TOP SALES PER LABOR HOUR	31125	22000	55000	34
11 - 49 STORE COMPANIES				
TOTAL	28000	25000	39500	594
BOTTOM SALES PER LABOR HOUR	35000	29473	40803	198
MIDDLE RANGE SALES PER LABOR HOUR	28000	25500	35000	246
TOP SALES PER LABOR HOUR	28000	25000	35000	73
50 + STORE COMPANIES				
TOTAL	36000	23980	41900	9484
BOTTOM SALES PER LABOR HOUR	38800	35000	47789	2909
MIDDLE RANGE SALES PER LABOR HOUR	21700	20000	37042	3046
TOP SALES PER LABOR HOUR	37000	24000	37000	2655

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1988-1989

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1988 VS. 1989. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 13A
AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
RESPONDING STORES	7571	57	49	179	266	226	598	1355	4841
NUMBER OF ITEMS	25855	18192	16943	18526	18337	22613	15092	22919	29020

TABLE 13B
AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
RESPONDING STORES	7571	57	156	436	6922	213	7358
NUMBER OF ITEMS	25855	18644	20249	21375	26322	19820	26029

TABLE 13C
AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
RESPONDING STORES	7571	207	106	1489	276	1987	33	562	1733	1178
NUMBER OF ITEMS	25855	29649	25358	15355	20101	39909	21087	20183	29470	13661

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 13D
AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET --

	ALL STORES
TOP IDENTICAL STORE SALES GROWTH	
RESPONDING STORES	482
NUMBER OF ITEMS	17744
TOP SALES PER SQUARE FOOT	
RESPONDING STORES	1339
NUMBER OF ITEMS	27172
TOP WEEKLY SALES	
RESPONDING STORES	3096
NUMBER OF ITEMS	20612
TOP SALES PER LABOR HOUR	
RESPONDING STORES	2331
NUMBER OF ITEMS	28437

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 14A
AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
RESPONDING STORES	6555	26	34	124	226	226	544	1909	3466
PRICE OF ITEMS	$1.56	$1.48	$1.36	$1.36	$1.39	$1.46	$1.69	$1.76	$1.45

TABLE 14B
AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
RESPONDING STORES	6555	28	88	339	6100	116	6439
PRICE OF ITEMS	$1.56	$1.49	$1.40	$1.41	$1.57	$1.42	$1.56

TABLE 14C
AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
RESPONDING STORES	6555	185	149	1423	273	1856	183	620	496	1370
PRICE OF ITEMS	$1.56	$1.42	$1.56	$1.36	$1.28	$1.41	$1.47	$1.75	$1.42	$2.00

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 15
MEDIAN AVERAGE SALE (IN DOLLARS) PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$17.60	$15.91	$19.06	10095
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	12.61	11.02	15.00	76
$10 - $30	16.48	14.50	17.50	71
$31 - $100	13.00	12.10	16.50	214
$101 - $250	15.50	15.47	21.64	282
$251 - $500	15.94	14.45	22.68	339
$501 - $1 BILLION	15.74	15.57	19.73	703
$1 BILLION - $3 BILLION	19.12	16.58	21.24	2576
OVER $3 BILLION	17.63	17.40	18.00	5834
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	24.49	23.45	24.49	285
MID ATLANTIC	17.40	17.40	17.40	1745
EAST NORTH CENTRAL	19.06	19.06	19.06	1553
WEST NORTH CENTRAL	14.12	14.12	15.94	388
SOUTHEAST	14.17	14.17	15.57	1992
WEST SOUTH CENTRAL	15.91	15.80	16.05	195
MOUNTAIN	17.68	17.57	17.75	632
PACIFIC	18.00	18.00	18.00	1743
CANADA	20.66	17.93	20.91	1562
NUMBER OF STORES				
1 STORE	13.61	11.62	17.88	74
2 - 10 STORES	16.29	13.82	19.61	189
11 - 49 STORES	15.94	14.22	19.40	583
50 + STORES	17.93	16.58	19.06	9249

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 16

MEDIAN AVERAGE NUMBER OF CHECKOUTS IN A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	8	7	10	8997
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	5	4	7	79
$10 - $30	6	5	7	75
$31 - $100	8	5	9	213
$101 - $250	8	4	9	265
$251 - $500	9	7	12	319
$501 - $1 BILLION	9	8	10	660
$1 BILLION - $3 BILLION	10	8	14	1552
OVER $3 BILLION	8	7	8	5834
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	15	14	15	210
MID ATLANTIC	8	8	8	1702
EAST NORTH CENTRAL	8	8	8	1545
WEST NORTH CENTRAL	14	8	14	388
SOUTHEAST	10	9	10	1993
WEST SOUTH CENTRAL	8	7	8	34
MOUNTAIN	6	6	6	632
PACIFIC	7	7	8	1688
CANADA	10	8	10	805
NUMBER OF STORES				
1 STORE	6	5	8	78
2 - 10 STORES	7	6	9	182
11 - 49 STORES	8	7	10	512
50 + STORES	8	7	10	8225

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 17
MEDIAN AVERAGE WEEKLY SALES PER CHECKOUT *

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$25000	$18522	$34411	10352
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	18000	15000	22727	79
$10 - $30	23800	20000	24496	75
$31 - $100	17106	12000	22563	218
$101 - $250	21077	14663	24826	293
$251 - $500	23177	13272	26199	339
$501 - $1 BILLION	18500	17111	24559	703
$1 BILLION - $3 BILLION	24207	19312	31192	2576
OVER $3 BILLION	33375	21738	35714	6069
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	31994	31994	33732	286
MID ATLANTIC	21738	21738	26199	1745
EAST NORTH CENTRAL	33375	33375	33375	1565
WEST NORTH CENTRAL	15653	15653	24207	388
SOUTHEAST	14186	14186	19312	1993
WEST SOUTH CENTRAL	12101	12101	18452	196
MOUNTAIN	45476	45476	45476	632
PACIFIC	35714	34750	35714	1747
CANADA	18500	14858	19348	1800
NUMBER OF STORES				
1 STORE	21117	16600	24191	78
2 - 10 STORES	22500	17768	25869	196
11 - 49 STORES	23177	18332	26199	594
50 + STORES	26204	18522	34750	9484

* 1989 WEEKLY SALES PER CHECKOUT WERE EXTRAPOLATED FROM THE AVERAGE WEEKLY SALES PER SUPERMARKET AND THE AVERAGE NUMBER OF CHECKOUTS. THIS IS CHANGED FROM PREVIOUS YEARS WHEN COMPANIES WERE ASKED TO PROVIDE WEEKLY SALES PER CHECKOUT.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 18A
PROFILE BY STORE TYPE --NUMBER OF STORES RESPONDING TO EACH ITEM

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
MEDIAN WEEKLY SALES	2834	1342	492	153
MEDIAN NUMBER OF CHECKOUTS	2280	1336	350	148
MEDIAN SALE/ CUSTOMER TRANSACTION	2728	1296	404	147
MEDIAN SALES/LABOR HOUR	1921	1092	386	139
MEDIAN WEEKLY SALES/SQUARE FOOT OF SELLING AREA	2775	1310	439	149
MEDIAN TOTAL SIZE/SQUARE FEET	2840	1349	492	154
AVERAGE RETAIL PRICE/ITEM	2181	996	298	131
AVERAGE NUMBER OF ITEMS CARRIED	1869	1252	316	138

NOTE: UNWEIGHTED DATA

TABLE 18B
PROFILE BY STORE TYPE

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
MEDIAN WEEKLY SALES	$131200	$298850	$364440	$319045
MEDIAN NUMBER OF CHECKOUTS	7	11	12	10
MEDIAN SALE/ CUSTOMER TRANSACTION	$17.13	$19.27	$19.48	$26.38
MEDIAN SALES/LABOR HOUR	$98.35	$107.04	$101.06	$131.75
MEDIAN WEEKLY SALES/SQUARE FOOT OF SELLING AREA	$10.15	$10.80	$10.40	$9.57
MEDIAN TOTAL SIZE/SQUARE FEET	20015	41500	50901	43000
AVERAGE RETAIL PRICE/ITEM	$1.73	$1.59	$1.69	$1.43
AVERAGE NUMBER OF ITEMS CARRIED	15800	22850	27814	16090

NOTE: EACH COLUMN IS INDIVIDUALLY WEIGHTED BY STORE TYPE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 19A
SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
UNWEIGHTED BASE	191	69	32	28	16	11	9	17	9
TOTAL RESPONDING STORES	10351	79	74	218	293	339	703	2576	6069
DELI OFFERING CARRY-OUT ITEMS	72.4%	82.3%	81.1%	64.7%	75.4%	75.8%	75.7%	72.2%	71.8%
GREETING CARDS	72.2	74.7	71.6	78.9	82.9	93.2	70.6	51.0	79.5
SCRATCH AND/OR BAKE-OFF BAKERY	62.1	67.1	73.0	55.0	66.9	67.3	62.0	64.6	60.6
BEER	59.8	64.6	67.6	65.6	63.1	58.4	46.1	63.7	59.2
COURTESY BOOTH	59.4	60.8	63.5	63.3	64.2	47.5	64.7	51.3	62.5
POSTAGE STAMPS	55.9	69.6	66.2	58.7	56.7	86.7	52.3	54.0	54.9
FLORAL/PLANT SHOP	50.6	40.5	43.2	38.5	43.0	54.6	44.7	40.0	56.5
WINE	49.0	55.7	52.7	45.0	58.4	53.7	28.6	49.2	50.6
PHOTO SERVICE	45.8	45.6	77.0	51.4	62.1	81.7	70.6	62.4	32.5
FRESH SEAFOOD	42.5	49.4	68.9	45.9	35.8	64.9	42.4	46.3	39.5
VIDEO RENTAL	36.5	49.4	45.9	50.5	46.1	51.6	34.9	26.2	39.0
READING CENTER	32.4	39.2	31.1	25.7	33.8	42.5	63.4	29.3	29.6
NUTRITIONAL SHELF TAGS	30.8	19.0	21.6	20.2	21.5	21.2	34.9	12.8	39.6
SALAD BAR	27.0	30.4	36.5	19.7	12.3	24.2	54.1	27.4	24.6
SERVICE MEAT	26.3	38.0	39.2	38.1	19.1	42.8	40.0	36.0	19.4
PHARMACY	23.7	1.3	17.6	9.6	27.3	32.4	11.7	25.2	24.6
LIQUOR	19.5	16.5	6.8	17.9	16.0	25.4	9.1	19.6	20.7
COSMETIC CENTER	17.0	16.5	10.8	17.0	4.4	28.6	33.6	22.5	12.7
CASH DISPENSING MACHINES (ATMs)	14.4	8.9	20.3	13.8	22.2	14.7	27.6	22.4	9.1
CATERING	11.3	31.6	27.0	15.6	10.9	.9	6.0	22.3	7.2
LUNCH COUNTER/SNACK BAR	10.6	13.9	29.7	31.2	9.9	15.9	30.6	18.6	3.7
HOME DELIVERY SERVICE	8.4	26.6	21.6	5.0	9.6	3.8	12.4	22.2	2.1
RESTAURANT	6.5	8.9	10.8	6.9	1.7	7.4	3.1	5.7	7.3
IN-STORE BANKS	5.1	5.1	10.8	3.2	2.0	2.9	9.4	5.0	5.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 19B
SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
UNWEIGHTED BASE	191	77	48	30	36	125	66
TOTAL RESPONDING STORES	10351	77	196	594	9484	273	10078
DELI OFFERING CARRY-OUT ITEMS	72.4%	89.6%	67.9%	67.3%	72.7%	74.0%	72.3%
GREETING CARDS	72.2	74.0	78.6	83.5	71.4	77.3	72.1
SCRATCH AND/OR BAKE-OFF BAKERY	62.1	76.6	64.8	62.8	61.9	68.1	61.9
BEER	59.8	63.6	71.4	57.9	59.6	69.2	59.5
COURTESY BOOTH	59.4	71.4	61.2	57.9	59.4	64.1	59.3
POSTAGE STAMPS	55.9	72.7	69.4	68.0	54.7	70.3	55.5
FLORAL/PLANT SHOP	50.6	42.9	47.4	55.1	50.4	46.2	50.7
WINE	49.0	51.9	58.7	50.0	48.7	56.8	48.8
PHOTO SERVICE	45.8	58.4	69.9	74.6	43.4	66.7	45.3
FRESH SEAFOOD	42.5	59.7	59.7	52.4	41.4	59.7	42.0
VIDEO RENTAL	36.5	49.4	42.9	55.6	35.0	44.7	36.3
READING CENTER	32.4	41.6	41.3	33.8	32.0	41.4	32.1
NUTRITIONAL SHELF TAGS	30.8	26.0	29.1	30.0	30.9	28.2	30.9
SALAD BAR	27.0	35.1	26.7	23.7	27.1	28.6	26.9
SERVICE MEAT	26.3	42.9	42.3	25.6	25.9	42.5	25.9
PHARMACY	23.7	6.5	17.9	32.8	23.4	14.7	23.9
LIQUOR	19.5	16.9	17.9	16.0	19.7	17.6	19.5
COSMETIC CENTER	17.0	18.2	15.8	19.0	16.9	16.5	17.0
CASH DISPENSING MACHINES (ATMs)	14.4	18.2	13.3	22.1	13.9	14.7	14.4
CATERING	11.3	35.1	25.0	12.6	10.7	27.8	10.8
LUNCH COUNTER/SNACK BAR	10.6	13.0	29.6	17.3	9.8	24.9	10.3
HOME DELIVERY SERVICE	8.4	26.0	11.2	3.5	8.6	15.4	8.3
RESTAURANT	6.5	5.2	10.7	5.7	6.5	9.2	6.4
IN-STORE BANKS	5.1	10.4	2.6	2.5	5.3	4.8	5.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 19C

SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
UNWEIGHTED BASE	191	14	24	51	19	24	9	12	22	16
TOTAL RESPONDING STORES	10351	286	1745	1564	388	1993	196	632	1747	1800
DELI OFFERING CARRY-OUT ITEMS	72.4%	95.1%	63.6%	78.4%	72.2%	83.5%	53.6%	80.4%	69.8%	61.5%
GREETING CARDS	72.2	59.1	65.0	80.2	96.6	95.7	88.3	69.6	97.5	17.8
SCRATCH AND/OR BAKE-OFF BAKERY	62.1	74.8	15.8	72.6	82.5	75.4	58.2	85.4	62.0	69.0
BEER	59.8	60.8	63.7	17.9	84.0	89.5	90.3	87.8	80.2	21.0
COURTESY BOOTH	59.4	93.0	29.7	94.4	80.9	74.9	43.4	45.7	67.4	29.5
POSTAGE STAMPS	55.9	69.2	88.7	31.1	90.2	36.4	88.3	99.4	91.3	4.4
FLORAL/PLANT SHOP	50.6	72.0	64.1	63.3	50.0	42.0	86.2	87.7	56.3	10.0
WINE	49.0	39.9	31.9	17.3	50.8	80.6	90.3	75.0	80.2	15.3
PHOTO SERVICE	45.8	92.0	25.8	20.8	87.4	75.4	90.8	66.3	27.7	43.4
FRESH SEAFOOD	42.5	95.8	13.1	48.0	41.0	44.5	91.3	56.5	59.0	29.8
VIDEO RENTAL	36.5	54.9	16.3	39.1	81.7	54.5	45.9	65.2	39.7	6.8
READING CENTER	32.4	22.7	9.1	18.6	64.4	21.3	18.4	4.3	79.2	39.8
NUTRITIONAL SHELF TAGS	30.8	56.3	9.6	68.3	21.4	14.7	3.6	83.2	50.4	.2
SALAD BAR	27.0	68.9	31.3	15.5	26.8	18.2	11.2	45.6	37.1	21.1
SERVICE MEAT	26.3	32.3	11.4	35.9	25.3	24.3	26.5	55.9	17.2	32.6
PHARMACY	23.7	19.2	8.3	36.9	36.1	12.6	52.0	43.4	28.3	22.9
LIQUOR	19.5	1.7	6.8	3.6	36.3	9.9	5.6	51.7	59.5	6.5
COSMETIC CENTER	17.0	25.5	11.3	29.8	34.5	14.5	51.5	25.5	15.3	3.8
CASH DISPENSING MACHINES (ATMs)	14.6	51.4	8.5	23.3	33.8	17.5	40.3	8.7	6.4	5.9
CATERING	11.3	2.8	19.2	22.8	37.4	.6	3.6	.9	7.8	14.8
LUNCH COUNTER/SNACK BAR	10.6	24.5	14.3	3.5	34.3	3.3	25.0	4.9	10.2	14.9
HOME DELIVERY SERVICE	8.4	2.8	2.2	1.3	19.3	.3	1.5	1.1	6.0	34.1
RESTAURANT	5.5	-	1.1	27.1	39.2	.4	.5	3.8	2.1	.3
IN-STORE BANKS	5.1	-	.7	19.6	2.3	1.5	1.5	1.1	3.4	5.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 19D
SPECIALTY/SERVICE DEPARTMENT

	ALL STORES	TOP IDENTICAL STORE SALES	TOP SALES PER SQUARE FOOT	TOP WEEKLY SALES	TOP SALES PER LABOR HOUR	BOTTOM SALES PER LABOR HOUR
UNWEIGHTED BASE	191	42	68	38	34	75
TOTAL RESPONDING STORES	10351	717	2232	3527	2772	3213
DELI OFFERING CARRY-OUT ITEMS	72.4%	74.3%	71.8%	75.2%	77.8%	82.3%
GREETING CARDS	72.2	90.9	63.8	74.6	78.3	89.8
SCRATCH AND/OR BAKE-OFF BAKERY	62.1	76.0	65.7	73.7	60.2	79.4
BEER	59.8	82.1	57.5	46.3	68.6	53.6
COURTESY BOOTH	59.4	66.4	44.9	64.8	63.9	92.8
POSTAGE STAMPS	55.9	82.3	66.6	61.0	78.4	28.3
FLORAL/PLANT SHOP	50.6	55.2	45.0	65.9	54.1	51.0
WINE	49.0	63.3	50.9	41.1	56.3	47.6
PHOTO SERVICE	45.8	77.0	61.2	46.7	49.6	51.9
FRESH SEAFOOD	42.5	52.6	64.0	64.0	56.3	48.7
VIDEO RENTAL	36.5	55.4	28.3	33.9	34.2	57.2
READING CENTER	32.4	45.6	27.3	21.1	58.7	18.5
NUTRITIONAL SHELF TAGS	30.8	15.8	25.1	56.7	37.9	32.4
SALAD BAR	27.0	21.6	24.5	27.2	43.8	9.6
SERVICE MEAT	26.3	26.8	34.8	41.7	26.3	29.3
PHARMACY	23.7	27.1	27.7	38.8	25.9	23.2
LIQUOR	19.5	19.7	29.9	25.9	42.3	7.4
COSMETIC CENTER	17.0	32.2	27.7	34.8	20.3	20.0
CASH DISPENSING MACHINES (ATMs)	14.4	27.2	30.9	27.1	17.5	16.3
CATERING	11.3	22.3	9.9	13.6	15.7	15.2
LUNCH COUNTER/SNACK BAR	10.6	29.7	23.6	11.9	12.0	7.8
HOME DELIVERY SERVICE	8.4	14.9	20.0	.7	4.8	2.1
RESTAURANT	6.5	22.0	6.8	13.5	1.0	17.4
IN-STORE BANKS	5.1	1.8	3.7	7.7	2.3	8.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 20A
AVERAGE PERCENTAGE OF CUSTOMER'S TRANSACTIONS PAID BY:

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	141	52	27	19	11	8	8	11	5
CHECK	45.9%	44.9%	48.0%	50.1%	40.6%	53.1%	47.9%	36.5%	46.7%
CASH	47.0	48.0	42.4	39.8	55.9	40.2	49.1	59.9	49.3
FOOD STAMPS	4.7	5.0	4.5	8.7	3.0	2.3	2.4	2.6	2.7
OTHER METHOD	2.4	2.2	5.1	1.4	.5	4.3	.6	1.0	1.3

TABLE 20B
AVERAGE PERCENTAGE OF CUSTOMER'S TRANSACTIONS PAID BY:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	141	60	36	21	24	96	45
CHECK	45.9%	45.8%	46.9%	45.6%	44.7%	46.3%	45.1%
CASH	47.0	47.0	43.9	46.8	51.9	45.9	49.5
FOOD STAMPS	4.7	4.7	5.7	5.3	2.5	5.1	3.8
OTHER METHOD	2.4	2.4	3.5	2.2	1.0	2.8	1.6

TABLE 20C
AVERAGE PERCENTAGE OF CUSTOMER'S TRANSACTIONS PAID BY:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	141	12	17	37	14	20	6	6	16	13
CHECK	45.9%	37.2%	42.9%	47.3%	56.7%	52.8%	53.3%	51.4%	45.6%	26.2%
CASH	47.0	55.0	52.8	46.0	30.4	39.9	31.9	38.5	50.4	70.7
FOOD STAMPS	4.7	3.6	3.2	4.8	9.8	6.3	12.1	1.5	2.3	.1
OTHER METHOD	2.4	4.1	1.2	1.9	3.2	1.1	2.6	8.6	1.6	3.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 21

MEDIAN NUMBER OF CHECKS ACCEPTED PER WEEK PER STORE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	2500	1800	3831	4416
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1500	1000	2764	48
$10 - $30	2500	2000	3000	39
$31 - $100	2500	1800	3000	127
$101 - $250	1550	866	4000	141
$251 - $500	2807	1800	5706	286
$501 - $1 BILLION	1876	665	2719	587
$1 BILLION - $3 BILLION	2857	675	4500	1480
OVER $3 BILLION	2500	2500	3831	1708
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	3458	3400	4500	285
MID ATLANTIC	1876	1800	3000	180
EAST NORTH CENTRAL	2719	1625	2807	280
WEST NORTH CENTRAL	6000	6000	6000	250
SOUTHEAST	2500	2500	2500	1859
WEST SOUTH CENTRAL	8320	8320	8320	180
MOUNTAIN	2525	2475	3330	101
PACIFIC	3831	3831	4174	486
CANADA	665	198	675	795
NUMBER OF STORES				
1 STORE	1850	1000	2938	44
2 - 10 STORES	2500	1628	3600	107
11 - 49 STORES	1876	1600	3751	429
50 + STORES	2500	2148	3831	3836

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 22

MEDIAN AVERAGE VALUE OF CHECKS ACCEPTED AT SUPERMARKETS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$50.00	$49.00	$61.95	4355
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	45.00	20.00	73.00	45
$10 - $30	60.00	50.00	75.00	35
$31 - $100	35.00	20.00	58.35	130
$101 - $250	45.00	41.36	74.82	125
$251 - $500	31.65	30.00	50.00	266
$501 - $1 BILLION	59.92	49.57	68.00	525
$1 BILLION - $3 BILLION	61.95	51.00	93.50	1521
OVER $3 BILLION	49.00	49.00	49.00	1708
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	69.69	51.00	69.69	209
MID ATLANTIC	55.00	31.65	70.00	117
EAST NORTH CENTRAL	49.57	41.36	50.00	247
WEST NORTH CENTRAL	61.95	46.00	61.95	252
SOUTHEAST	49.00	49.00	51.00	1856
WEST SOUTH CENTRAL	50.00	50.00	50.00	180
MOUNTAIN	30.00	30.00	50.00	85
PACIFIC	45.00	45.00	53.98	497
CANADA	88.67	63.75	113.90	912
NUMBER OF STORES				
1 STORE	51.62	32.55	75.00	40
2 - 10 STORES	55.00	30.00	79.89	107
11 - 49 STORES	50.00	35.00	55.06	393
50 + STORES	50.00	49.00	61.95	3815

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 23

MEDIAN NUMBER OF CHECKS ACCEPTED PER WEEK RETURNED FOR INSUFFICIENT FUNDS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	20	10	26	4246
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	7	4	20	61
$10 - $30	10	8	15	37
$31 - $100	16	14	20	135
$101 - $250	9	4	15	141
$251 - $500	8	8	13	266
$501 - $1 BILLION	10	6	20	703
$1 BILLION - $3 BILLION	19	6	37	1195
OVER $3 BILLION	26	26	26	1708
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	18	15	18	104
MID ATLANTIC	10	9	18	182
EAST NORTH CENTRAL	15	10	40	260
WEST NORTH CENTRAL	45	26	45	255
SOUTHEAST	26	26	26	1976
WEST SOUTH CENTRAL	15	15	25	21
MOUNTAIN	5	5	13	99
PACIFIC	12	12	32	495
CANADA	6	3	6	854
NUMBER OF STORES				
1 STORE	6	3	12	59
2 - 10 STORES	10	5	20	111
11 - 49 STORES	10	9	18	409
50 + STORES	26	12	26	3667

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 24

MEDIAN NUMBER OF CHECKS WRITTEN OFF AS UNCOLLECTABLE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	4	1	8	3013
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1	1	5	58
$10 - $30	1	1	2	36
$31 - $100	5	2	8	135
$101 - $250	1	1	3	141
$251 - $500	3	1	4	243
$501 - $1 BILLION	2	1	9	660
$1 BILLION - $3 BILLION	6	1	11	1261
OVER $3 BILLION	5	2	5	479
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	4	4	50	170
MID ATLANTIC	4	1	4	136
EAST NORTH CENTRAL	1	1	2	239
WEST NORTH CENTRAL	6	6	6	254
SOUTHEAST	11	3	12	747
WEST SOUTH CENTRAL	2	2	10	21
MOUNTAIN	4	4	4	98
PACIFIC	5	5	8	494
CANADA	1	1	2	854
NUMBER OF STORES				
1 STORE	1	1	3	55
2 - 10 STORES	2	1	4	111
11 - 49 STORES	2	1	5	343
50 + STORES	4	2	8	2504

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 25

MEDIAN AVERAGE VALUE OF THE CHECKS WRITTEN OFF

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$57.70	$49.00	$63.75	2989
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	43.85	20.00	70.00	50
$10 - $30	50.00	28.25	60.00	36
$31 - $100	33.00	23.40	58.03	129
$101 - $250	60.57	50.00	85.00	141
$251 - $500	48.54	30.00	56.00	266
$501 - $1 BILLION	59.50	53.56	65.00	703
$1 BILLION - $3 BILLION	58.20	49.00	63.75	1185
OVER $3 BILLION	57.40	55.80	58.00	479
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	58.03	51.00	58.20	170
MID ATLANTIC	56.55	48.54	125.00	178
EAST NORTH CENTRAL	53.56	50.00	60.57	259
WEST NORTH CENTRAL	27.18	27.18	35.00	255
SOUTHEAST	55.80	49.00	63.91	737
WEST SOUTH CENTRAL	33.00	20.00	33.00	20
MOUNTAIN	30.00	30.00	55.82	97
PACIFIC	57.90	57.20	58.99	495
CANADA	63.75	59.50	82.45	778
NUMBER OF STORES				
1 STORE	44.95	22.50	70.00	52
2 - 10 STORES	50.00	31.70	85.00	100
11 - 49 STORES	55.82	40.00	75.00	409
50 + STORES	57.70	49.00	60.35	2428

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 26A
PERCENTAGE OF SUPERMARKETS ACCEPTING CREDIT CARDS

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
RESPONDING STORES	10352	79	75	218	293	339	703	2576	6069
PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS	3.3%	17.7%	28.0%	6.0%	4.4%	.6%	17.1%	4.7%	.6%
PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/ OR NON-FOODS	11.8	19.0	20.0	8.7	26.3	33.3	22.0	21.3	4.7

TABLE 26B
PERCENTAGE OF SUPERMARKETS ACCEPTING CREDIT CARDS

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
RESPONDING STORES	10352	78	196	594	9484	274	10078
PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS	3.3%	24.4%	11.2%	3.5%	2.9%	15.0%	2.9%
PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/ OR NON-FOODS	11.8	23.1	18.4	32.7	10.3	19.7	11.6

TABLE 26C
PERCENTAGE OF SUPERMARKETS ACCEPTING CREDIT CARDS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
RESPONDING STORES	10352	286	1745	1565	388	1993	196	632	1747	1800
PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS	3.3%	3.5%	3.6%	6.8%	10.3%	2.5%	1.0%	.5%	2.0%	1.7%
PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/ OR NON-FOODS	11.8	33.6	4.1	11.2	20.4	17.0	73.0	4.4	11.2	5.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 27A
PERCENTAGE OF STORES WITH SCANNING

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
RESPONDING STORES	10352	79	75	218	293	339	703	2576	6069
PERCENTAGE SCANNING	57.7%	69.6%	85.3%	71.1%	57.7%	61.4%	74.5%	52.7%	56.6%

TABLE 27B
PERCENTAGE OF STORES WITH SCANNING

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
RESPONDING STORES	10352	78	196	594	9484	274	10078
PERCENTAGE SCANNING	57.7%	73.1%	86.2%	74.7%	55.9%	82.5%	57.0%

TABLE 27C
PERCENTAGE OF STORES WITH SCANNING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
RESPONDING STORES	10352	286	1745	1565	388	1993	196	632	1747	1800
PERCENTAGE SCANNING	57.7%	90.9%	43.7%	15.9%	82.2%	90.3%	12.8%	7.6%	96.9%	45.3%

TABLE 27D
PERCENTAGE OF STORES WITH SCANNING

	ALL STORES
TOP IDENTICAL STORE GROWTH	
RESPONDING STORES	718
PERCENTAGE SCANNING	49.2%
TOP SALES PER SQUARE FOOT	
RESPONDING STORES	2232
PERCENTAGE SCANNING	66.4%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 28A
COMPANIES SCANNING IN 100% OF STORES

	ALL COMPANIES	ANNUAL SALES IN MILLIONS UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	186	69	32	28	15	10	9	16	7
WITH 100% SCANNING	60.2%	68.1%	84.4%	50.0%	60.0%	50.0%	22.2%	31.3%	42.9%

TABLE 28B
COMPANIES SCANNING IN 100% OF STORES

	ALL COMPANIES	NUMBER OF STORES OPERATED 1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	186	77	48	29	32	125	61
WITH 100% SCANNING	60.2%	74.0%	72.9%	37.9%	28.1%	73.6%	32.8%

TABLE 28C
COMPANIES SCANNING IN 100% OF STORES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	186	14	24	49	19	24	8	10	22	16
WITH 100% SCANNING	60.2%	64.3%	58.3%	65.3%	63.2%	45.8%	62.5%	90.0%	63.6%	37.5%

TABLE 28D
COMPANIES SCANNING IN 100% OF STORES

	ALL COMPANIES
TOP IDENTICAL STORE GROWTH	
TOTAL COMPANIES	41
WITH 100% SCANNING	58.5%
TOP SALES PER SQUARE FOOT	
TOTAL COMPANIES	66
WITH 100% SCANNING	71.2%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 29

CHARACTERISTICS OF COMPANIES WITH 100% SCANNING

	ALL COMPANIES
TOTAL COMPANIES	112
MEDIAN ANNUAL SALES GROWTH	6.1%
MEDIAN IDENTICAL STORES GROWTH	5.5%
MEDIAN SALES PER SQUARE FOOT	$10.09
MEDIAN SALES PER LABOR HOUR	$86.01
MEDIAN AVERAGE NUMBER OF ITEMS	20000

TABLE 30A

CURRENT (1989) USES OF SCANNING POS DATA AT THE STORE LEVEL ** (PERCENTAGE OF COMPANIES)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	192	69	33	28	16	11	9	17	9
CHECKER PERFORMANCE	52.1%	52.2%	69.7%	60.7%	31.3%	54.5%	44.4%	41.2%	22.2%
LABOR SCHEDULING	39.1	31.9	48.5	50.0	43.8	27.3	33.3	41.2	33.3
DISPLAY/AD ANALYSIS	27.1	34.8	39.4	21.4	12.5	18.2	11.1	17.6	11.1
SHELF SPACE MANAGEMENT	19.8	24.6	42.4	7.1	-	9.1	11.1	17.6	-
SHRINK ANALYSIS	12.0	10.1	21.2	10.7	18.8	-	-	17.6	-
COMPUTER ASSISTED ORDERING	10.9	7.2	21.2	10.7	12.5	9.1	-	17.6	-
MARKETING BY INDIVIDUAL STORE	8.9	2.9	9.1	14.3	-	-	11.1	29.4	22.2
ELECTRONIC SHELF TAGS	7.8	10.1	6.1	10.7	-	9.1	-	11.8	-
FREQUENT SHOPPER PROGRAMS	6.8	5.8	12.1	7.1	6.3	9.1	-	5.9	-
PRICE ELASTICITY ANALYSIS	5.2	7.2	12.1	-	-	-	-	5.9	-
MARKETING BY STORE CLUSTER	1.6	-	3.0	-	-	-	-	11.8	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 30B

CURRENT (1989) USES OF SCANNING POS DATA AT THE STORE LEVEL ** (PERCENTAGE OF COMPANIES)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	192	78	48	30	36	126	66
CHECKER PERFORMANCE	52.1%	57.7%	52.1%	50.0%	41.7%	55.6%	45.5%
LABOR SCHEDULING	39.1	38.5	41.7	40.0	36.1	39.7	37.9
DISPLAY/AD ANALYSIS	27.1	37.2	25.0	16.7	16.7	32.5	16.7
SHELF SPACE MANAGEMENT	19.8	32.1	14.6	6.7	11.1	25.4	9.1
SHRINK ANALYSIS	12.0	14.1	8.3	16.7	8.3	11.9	12.1
COMPUTER ASSISTED ORDERING	10.9	11.5	14.6	6.7	8.3	12.7	7.6
MARKETING BY INDIVIDUAL STORE	8.9	-	16.7	3.3	22.2	6.3	13.6
ELECTRONIC SHELF TAGS	7.8	9.0	8.3	6.7	5.6	8.7	6.1
FREQUENT SHOPPER PROGRAMS	6.8	6.4	8.3	10.0	2.8	7.1	6.1
PRICE ELASTICITY ANALYSIS	5.2	6.4	8.3	-	2.8	7.1	1.5
MARKETING BY STORE CLUSTER	1.6	-	2.1	-	5.6	.8	3.0

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 30C

CURRENT (1989) USES OF SCANNING POS DATA AT THE STORE LEVEL ** (PERCENTAGE OF COMPANIES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	192	14	24	52	19	24	9	12	22	16
CHECKER PERFORMANCE	52.1%	42.9%	45.8%	46.2%	68.4%	50.0%	55.6%	50.0%	68.2%	50.0%
LABOR SCHEDULING	39.1	35.7	33.3	34.6	52.6	41.7	44.4	16.7	45.5	50.0
DISPLAY/AD ANALYSIS	27.1	21.4	12.5	32.7	31.6	29.2	44.4	33.3	22.7	18.8
SHELF SPACE MANAGEMENT	19.8	42.9	8.3	19.2	42.1	4.2	11.1	25.0	18.2	18.8
SHRINK ANALYSIS	12.0	21.4	-	15.4	15.8	8.3	22.2	16.7	4.5	12.5
COMPUTER ASSISTED ORDERING	10.9	14.3	12.5	9.6	15.8	4.2	11.1	8.3	4.5	25.0
MARKETING BY INDIVIDUAL STORE	8.9	14.3	8.3	1.9	5.3	12.5	11.1	8.3	13.6	18.8
ELECTRONIC SHELF TAGS	7.8	-	-	9.6	5.3	4.2	33.3	8.3	13.6	6.3
FREQUENT SHOPPER PROGRAMS	6.8	-	4.2	3.8	21.1	4.2	11.1	8.3	13.6	-
PRICE ELASTICITY ANALYSIS	5.2	-	-	[illegible].5	5.3	4.2	11.1	-	4.5	-
MARKETING BY STORE CLUSTER	1.6	7.1	-	1.9	-	-	-	-	-	6.3

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 31A

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE STORE LEVEL ** (PERCENTAGE OF COMPANIES)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	192	69	33	28	16	11	9	17	9
CHECKER PERFORMANCE	40.6%	44.9%	60.6%	28.6%	25.0%	45.5%	33.3%	29.4%	22.2%
LABOR SCHEDULING	37.0	37.7	42.4	39.3	43.8	27.3	22.2	29.4	33.3
SHELF SPACE MANAGEMENT	20.3	29.0	39.4	7.1	6.3	-	-	17.6	-
DISPLAY/AD ANALYSIS	20.3	27.5	36.4	14.3	-	9.1	-	11.8	11.1
SHRINK ANALYSIS	17.2	15.9	27.3	10.7	18.8	9.1	33.3	17.6	-
COMPUTER ASSISTED ORDERING	14.1	10.1	21.2	14.3	18.8	-	11.1	23.5	11.1
FREQUENT SHOPPER PROGRAMS	9.9	11.6	18.2	14.3	-	9.1	-	-	-
ELECTRONIC SHELF TAGS	7.3	5.8	9.1	7.1	12.5	9.1	-	5.9	11.1
MARKETING BY INDIVIDUAL STORE	7.3	1.4	12.1	14.3	-	-	-	17.6	22.2
PRICE ELASTICITY ANALYSIS	6.3	10.1	15.2	-	-	-	-	-	-
MARKETING BY STORE CLUSTER	1.6	-	3.0	-	-	-	-	11.8	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 31B

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE STORE LEVEL ** (PERCENTAGE OF COMPANIES)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	192	78	48	30	36	126	66
CHECKER PERFORMANCE	40.6%	50.0%	39.6%	26.7%	33.3%	46.0%	30.3%
LABOR SCHEDULING	37.0	41.0	39.6	30.0	30.6	40.5	30.3
SHELF SPACE MANAGEMENT	20.3	34.6	16.7	-	11.1	27.8	6.1
DISPLAY/AD ANALYSIS	20.3	29.5	20.8	10.0	8.3	26.2	9.1
SHRINK ANALYSIS	17.2	20.5	12.5	10.0	22.2	17.5	16.7
COMPUTER ASSISTED ORDERING	14.1	15.4	14.6	6.7	16.7	15.1	12.1
FREQUENT SHOPPER PROGRAMS	9.9	12.8	14.6	6.7	-	13.5	3.0
ELECTRONIC SHELF TAGS	7.3	7.7	6.3	10.0	5.6	7.1	7.6
MARKETING BY INDIVIDUAL STORE	7.3	-	16.7	3.3	13.9	6.3	9.1
PRICE ELASTICITY ANALYSIS	6.3	10.3	8.3	-	-	9.5	-
MARKETING BY STORE CLUSTER	1.6	-	2.1	-	5.6	.8	3.0

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 31C

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE STORE LEVEL ** (PERCENTAGE OF COMPANIES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	192	14	24	52	19	24	9	12	22	16
CHECKER PERFORMANCE	40.6%	42.9%	33.3%	42.3%	52.6%	29.2%	33.3%	50.0%	40.9%	43.8%
LABOR SCHEDULING	37.0	50.0	33.3	38.5	42.1	25.0	44.4	41.7	27.3	43.8
SHELF SPACE MANAGEMENT	20.3	3 .7	12.5	21.7	42.1	4.2	11.1	25.0	13.6	25.0
DISPLAY/AD ANALYSIS	20.3	21.4	4.2	26.9	31.6	12.5	44.4	16.7	13.6	18.8
SHRINK ANALYSIS	17.2	28.6	8.3	19.2	21.1	4.2	22.2	25.0	4.5	37.5
COMPUTER ASSISTED ORDERING	14.1	14.3	25.0	15.4	10.5	-	11.1	25.0	-	31.3
FREQUENT SHOPPER PROGRAMS	9.9	7.1	16.7	5.8	15.8	12.5	11.1	16.7	9.1	-
ELECTRONIC SHELF TAGS	7.3	-	4.2	7.7	-	8.3	22.2	-	13.6	12.5
MARKETING BY INDIVIDUAL STORE	7.3	14.3	8.3	3.8	-	8.3	11.1	8.3	9.1	12.5
PRICE ELASTICITY ANALYSIS	6.3	7.1	4.2	11.5	5.3	4.2	11.1	-	4.5	-
MARKETING BY STORE CLUSTER	1.6	7.1	-	1.9	-	-	-	-	-	6.3

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 31D

CURRENT (1989) USES OF SCANNING POS DATA AT THE STORE LEVEL ** - (PERCENTAGE OF COMPANIES)

	ALL STORES	TOP IDENTICAL STORE SALES	TOP SALES PER SQUARE FOOT	TOP WEEKLY SALES	TOP SALES PER LABOR HOUR	BOTTOM SALES PER LABOR HOUR
TOTAL COMPANIES	192	43	68	38	34	76
CHECKER PERFORMANCE	52.1%	46.5%	51.5%	47.4%	52.9%	46.1%
LABOR SCHEDULING	39.1	44.2	41.2	42.1	50.0	32.9
DISPLAY/AD ANALYSIS	27.1	27.9	26.5	18.4	23.5	30.3
SHELF SPACE MANAGEMENT	19.8	16.3	20.6	18.4	20.6	17.1
SHRINK ANALYSIS	12.0	16.3	16.2	10.5	14.7	10.5
COMPUTER ASSISTED ORDERING	10.9	11.6	16.2	18.4	17.6	9.2
MARKETING BY INDIVIDUAL STORE	8.9	7.0	10.3	7.9	8.8	3.9
ELECTRONIC SHELF TAGS	7.8	4.7	4.4	7.9	5.9	7.9
FREQUENT SHOPPER PROGRAMS	6.8	7.0	2.9	7.9	11.8	3.9
PRICE ELASTICITY ANALYSIS	5.2	11.6	4.4	2.6	-	6.6
MARKETING BY STORE CLUSTER	1.6	2.3	2.9	2.6	-	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 32A

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE STORE LEVEL ** - TOP IDENTICAL STORE GROWTH (PERCENTAGE OF COMPANIES)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	43	16	10	4	7	1	1	3	1
LABOR SCHEDULING	46.5%	43.8%	50.0%	25.0%	57.1%				
CHECKER PERFORMANCE	39.5	43.8	60.0	25.0	14.3				
SHRINK ANALYSIS	27.9	25.0	50.0	-	28.6				
DISPLAY/AD ANALYSIS	20.9	31.3	30.0	25.0	-				
SHELF SPACE MANAGEMENT	16.3	6.3	50.0	-	14.3				
COMPUTER ASSISTED ORDERING	11.6	6.3	20.0	-	28.6				
PRICE ELASTICITY ANALYSIS	11.6	12.5	30.0	-	-				
FREQUENT SHOPPER PROGRAMS	11.6	18.8	20.0	-	-				
ELECTRONIC SHELF TAGS	9.3	6.3	10.0	-	28.6				
MARKETING BY INDIVIDUAL STORE	7.0	-	20.0	25.0	-				
MARKETING BY STORE CLUSTER	2.3	-	10.0	-	-				

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 32B

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE STORE LEVEL ** - TOP IDENTICAL STORE GROWTH (PERCENTAGE OF COMPANIES)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	43	21	11	5	6	32	11
LABOR SCHEDULING	46.5%	47.6%	45.5%	40.0%	50.0%	46.9%	45.5%
CHECKER PERFORMANCE	39.5	47.6	36.4	-	50.0	43.8	27.3
SHRINK ANALYSIS	27.9	33.3	18.2	20.0	33.3	28.1	27.3
DISPLAY/AD ANALYSIS	20.9	28.6	27.3	-	-	28.1	-
SHELF SPACE MANAGEMENT	16.3	19.0	18.2	-	16.7	18.8	9.1
COMPUTER ASSISTED ORDERING	11.6	9.5	18.2	20.0	-	12.5	9.1
PRICE ELASTICITY ANALYSIS	11.6	9.5	27.3	-		15.6	-
FREQUENT SHOPPER PROGRAMS	11.6	14.3	18.2	-	-	15.6	-
ELECTRONIC SHELF TAGS	9.3	4.8	18.2	20.0	-	9.4	9.1
MARKETING BY INDIVIDUAL STORE	7.0	-	27.3	-	-	9.4	-
MARKETING BY STORE CLUSTER	2.3	-	9.1	-	-	3.1	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 32C
PLANNED USES OF SCANNING POS DATA IN 1990 AT THE STORE LEVEL ** - TOP IDENTICAL STORE GROWTH (PERCENTAGE OF COMPANIES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	43	6	3	12	6	3	3	2	5	3
LABOR SCHEDULING	46.5%	83.3%		41.7%	33.3%				40.0%	
CHECKER PERFORMANCE	39.5	50.0		33.3	33.3				60.0	
SHRINK ANALYSIS	27.9	50.0		25.0	33.3				-	
DISPLAY/AD ANALYSIS	20.9	16.7		33.3	16.7				20.0	
SHELF SPACE MANAGEMENT	16.3	33.3		8.3	16.7				20.0	
COMPUTER ASSISTED ORDERING	11.6	16.7		16.7	-				-	
PRICE ELASTICITY ANALYSIS	11.6	16.7		25.0	-				20.0	
FREQUENT SHOPPER PROGRAMS	11.6	16.7		16.7	-				-	
ELECTRONIC SHELF TAGS	9.3	-		8.3	-				-	
MARKETING BY INDIVIDUAL STORE	7.0	-		16.7	-				-	
MARKETING BY STORE CLUSTER	2.3	-		8.3	-				-	

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 33A

CURRENT (1989) USES OF SCANNING POS DATA AT THE HEADQUARTERS LEVEL ** (PERCENTAGE OF COMPANIES)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	192	69	33	28	16	11	9	17	9
SHELF SPACE MANAGEMENT	9.9%	1.4%	6.1%	14.3%	18.8%	-	33.3%	23.5%	22.2%
DISPLAY/AD ANALYSIS	7.8	1.4	6.1	7.1	6.3	9.1	22.2	23.5	22.2
SHRINK ANALYSIS	4.2	-	3.0	3.6	-	-	11.1	11.8	33.3
MARKETING BY STORE CLUSTER	4.2	-	-	3.6	-	-	-	35.3	11.1
PRICE ELASTICITY ANALYSIS	3.1	-	-	-	6.3	-	22.2	5.9	22.2
MARKETING BY INDIVIDUAL STORE	3.1	-	-	-	12.5	-	-	11.8	22.2
ELECTRONIC SHELF TAGS	1.6	-	-	-	18.8	-	-	-	-
COMPUTER ASSISTED ORDERING	1.6	-	-	-	6.3	-	-	-	22.2
FREQUENT SHOPPER PROGRAMS	1.6	-	-	3.6	-	-	-	5.9	11.1
CHECKER PERFORMANCE	1.0	-	3.0	3.6	-	-	-	-	-
LABOR SCHEDULING	.5	-	-	-	-	-	-	5.9	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 33B

CURRENT (1989) USES OF SCANNING POS DATA AT THE HEADQUARTERS LEVEL ** (PERCENTAGE OF COMPANIES)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	192	78	48	30	36	126	66
SHELF SPACE MANAGEMENT	9.9%	-	16.7%	6.7%	25.0%	6.3%	16.7%
DISPLAY/AD ANALYSIS	7.8	-	12.5	3.3	22.2	4.8	13.6
SHRINK ANALYSIS	4.2	-	6.3	-	13.9	2.4	7.6
MARKETING BY STORE CLUSTER	4.2	-	2.1	-	19.4	.8	10.6
PRICE ELASTICITY ANALYSIS	3.1	-	2.1	-	13.9	.8	7.6
MARKETING BY INDIVIDUAL STORE	3.1	-	-	6.7	11.1	-	9.1
ELECTRONIC SHELF TAGS	1.6	-	4.2	3.3	-	1.6	1.5
COMPUTER ASSISTED ORDERING	1.6	-	-	3.3	5.6	-	4.5
FREQUENT SHOPPER PROGRAMS	1.6	-	2.1	-	5.6	.8	3.0
CHECKER PERFORMANCE	1.0	-	4.2	-	-	1.6	-
LABOR SCHEDULING	.5	-	-	-	2.8	-	1.5

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 33C

CURRENT (1989) USES OF SCANNING POS DATA AT THE HEADQUARTERS LEVEL ** (PERCENTAGE OF COMPANIES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	192	14	24	52	19	24	9	12	22	16
SHELF SPACE MANAGEMENT	9.9%	-	12.5%	5.8%	5.3%	8.3%	-	8.3%	27.3%	18.8%
DISPLAY/AD ANALYSIS	7.8	7.1	25.0	1.9	5.3	4.2	-	8.3	18.2	-
SHRINK ANALYSIS	4.2	21.4	-	1.9	5.3	-	-	-	13.6	-
MARKETING BY STORE CLUSTER	4.2	7.1	4.2	-	-	8.3	11.1	-	9.1	6.3
PRICE ELASTICITY ANALYSIS	3.1	-	4.2	-	5.3	4.2	-	-	13.6	-
MARKETING BY INDIVIDUAL STORE	3.1	7.1	-	3.8	-	-	-	-	4.5	12.5
ELECTRONIC SHELF TAGS	1.6	-	-	-	-	4.2	-	-	-	12.5
COMPUTER ASSISTED ORDERING	1.6	-	-	-	-	4.2	-	-	9.1	-
FREQUENT SHOPPER PROGRAMS	1.6	-	-	-	-	-	11.1	-	4.5	6.3
CHECKER PERFORMANCE	1.0	-	-	1.9	-	-	-	8.3	-	-
LABOR SCHEDULING	.5	-	-	-	-	-	-	-	4.5	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 34A

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE HEADQUARTERS LEVEL ** (PERCENTAGE OF COMPANIES)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	192	69	33	28	16	11	9	17	9
DISPLAY/AD ANALYSIS	10.4%	1.4%	3.0%	21.4%	18.8%	9.1%	22.2%	23.5%	22.2%
SHELF SPACE MANAGEMENT	9.4	-	9.1	17.9	6.3	-	33.3	17.6	33.3
FREQUENT SHOPPER PROGRAMS	6.8	-	3.0	17.9	-	18.2	22.2	11.8	11.1
SHRINK ANALYSIS	6.3	-	3.0	14.3	-	-	11.1	11.8	44.4
MARKETING BY STORE CLUSTER	6.3	-	-	3.6	12.5	-	22.2	35.3	11.1
MARKETING BY INDIVIDUAL STORE	5.7	-	-	3.6	25.0	-	11.1	17.6	22.2
PRICE ELASTICITY ANALYSIS	3.6	-	-	3.6	18.8	-	11.1	-	22.2
LABOR SCHEDULING	2.6	-	-	7.1	-	-	22.2	5.9	-
COMPUTER ASSISTED ORDERING	2.6	-	-	-	6.3	-	-	11.8	22.2
CHECKER PERFORMANCE	1.6	-	3.0	7.1	-	-	-	-	-
ELECTRONIC SHELF TAGS	1.0	-	-	-	6.3	-	-	5.9	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 34B

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE HEADQUARTERS LEVEL ** (PERCENTAGE OF COMPANIES)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	192	78	48	30	36	126	66
DISPLAY/AD ANALYSIS	10.4%	-	14.6%	16.7%	22.2%	5.6%	19.7%
SHELF SPACE MANAGEMENT	9.4	-	10.4	13.3	25.0	4.0	19.7
FREQUENT SHOPPER PROGRAMS	6.8	-	8.3	10.0	16.7	3.2	13.6
SHRINK ANALYSIS	6.3	-	8.3	6.7	16.7	3.2	12.1
MARKETING BY STORE CLUSTER	6.3	-	4.2	3.3	25.0	1.6	15.2
MARKETING BY INDIVIDUAL STORE	5.7	-	4.2	10.0	16.7	1.6	13.6
PRICE ELASTICITY ANALYSIS	3.6	-	4.2	6.7	8.3	1.6	7.6
LABOR SCHEDULING	2.6	-	-	6.7	8.3	-	7.6
COMPUTER ASSISTED ORDERING	2.6	-	-	3.3	11.1	-	7.6
CHECKER PERFORMANCE	1.6	-	4.2	3.3	-	1.6	1.5
ELECTRONIC SHELF TAGS	1.0	-	2.1	-	2.8	.8	1.5

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 34C

PLANNED USES OF SCANNING POS DATA IN 1990 AT THE HEADQUARTERS LEVEL ** (PERCENTAGE OF COMPANIES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	192	14	24	52	19	24	9	12	22	16
DISPLAY/AD ANALYSIS	10.4%	7.1%	20.8%	3.8%	10.5%	8.3%	22.2%	8.3%	9.1%	18.8%
SHELF SPACE MANAGEMENT	9.4	-	16.7	3.8	10.5	12.5	11.1	8.3	18.2	6.3
FREQUENT SHOPPER PROGRAMS	6.8	-	12.5	3.8	5.3	-	22.2	16.7	4.5	12.5
SHRINK ANALYSIS	6.3	21.4	4.2	1.9	10.5	8.3	11.1	-	9.1	-
MARKETING BY STORE CLUSTER	6.3	7.1	4.2	1.9	-	8.3	22.2	-	4.5	25.0
MARKETING BY INDIVIDUAL STORE	5.7	7.1	-	1.9	-	4.2	22.2	-	4.5	31.3
PRICE ELASTICITY ANALYSIS	3.6	-	-	-	5.3	4.2	11.1	-	9.1	12.5
LABOR SCHEDULING	2.6	-	4.2	-	10.5	4.2	-	-	4.5	-
COMPUTER ASSISTED ORDERING	2.6	-	-	-	-	8.3	-	-	13.6	-
CHECKER PERFORMANCE	1.6	-	-	1.9	5.3	-	-	8.3	-	-
ELECTRONIC SHELF TAGS	1.0	-	-	-	-	4.2	11.1	-	-	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 34D

CURRENT (1989) USES OF SCANNING POS DATA AT THE HEADQUARTERS LEVEL ** - (PERCENTAGE OF COMPANIES)

	ALL STORES	TOP IDENTICAL STORE SALES	TOP SALES PER SQUARE FOOT	TOP WEEKLY SALES	TOP SALES PER LABOR HOUR	BOTTOM SALES PER LABOR HOUR
TOTAL COMPANIES	192	43	68	38	34	76
SHELF SPACE MANAGEMENT	9.9%	11.6%	8.8%	15.8%	29.4%	1.3%
DISPLAY/AD ANALYSIS	7.8	4.7	11.8	13.2	17.6	2.6
SHRINK ANALYSIS	4.2	4.7	5.9	7.9	8.8	1.3
MARKETING BY STORE CLUSTER	4.2	2.3	5.9	7.9	14.7	1.3
PRICE ELASTICITY ANALYSIS	3.1	2.3	4.4	10.5	8.8	-
MARKETING BY INDIVIDUAL STORE	3.1	4.7	5.9	10.5	8.8	1.3
ELECTRONIC SHELF TAGS	1.6	4.7	-	7.9	5.9	-
COMPUTER ASSISTED ORDERING	1.6	-	1.5	2.6	8.8	-
FREQUENT SHOPPER PROGRAMS	1.6	2.3	1.5	-	5.9	1.3
CHECKER PERFORMANCE	1.0	2.3	2.9	-	-	1.3
LABOR SCHEDULING	.5	-	1.5	2.6	2.9	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 35A
LEVELS OF EXPERIENCE WITH COMPUTERIZED SPACE MANAGEMENT

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	172	64	29	25	15	9	8	16	6
NO EXPERIENCE	46.5%	62.5%	44.8%	52.0%	53.3%	44.4%	12.5%	-	16.7%
INVESTIGATED	15.7	23.4	20.7	4.0	13.3	11.1	-	12.5	-
TESTED	9.9	3.1	10.3	16.0	-	22.2	25.0	12.5	33.3
RECEIVED APPROVAL TO IMPLEMENT	2.9	-	-	8.0	6.7	-	-	6.3	16.7
ACTUALLY IMPLEMENTED	16.9	4.7	20.7	16.0	26.7	11.1	50.0	37.5	16.7
CHANGED ROUTINE BUSINESS PRACTICES	8.1	6.3	3.4	4.0	-	11.1	12.5	31.3	16.7

TABLE 35B
LEVELS OF EXPERIENCE WITH COMPUTERIZED SPACE MANAGEMENT

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	172	73	41	27	31	114	58
NO EXPERIENCE	46.5%	57.5%	51.2%	51.9%	9.7%	55.3%	29.3%
INVESTIGATED	15.7	21.9	14.6	11.1	6.5	19.3	8.6
TESTED	9.9	6.8	7.3	7.4	22.6	7.0	15.5
RECEIVED APPROVAL TO IMPLEMENT	2.9	-	2.4	7.4	6.5	.9	6.9
ACTUALLY IMPLEMENTED	16.9	8.2	19.5	18.5	32.3	12.3	25.9
CHANGED ROUTINE BUSINESS PRACTICES	8.1	5.5	4.9	3.7	22.6	5.3	13.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 35C
LEVELS OF EXPERIENCE WITH COMPUTERIZED SPACE MANAGEMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	172	14	22	46	15	24	7	10	19	15
NO EXPERIENCE	46.5%	42.9%	40.9%	67.4%	40.0%	41.7%	42.9%	60.0%	31.6%	20.0%
INVESTIGATED	15.7	14.3	18.2	15.2	20.0	12.5	14.3	10.0	26.3	6.7
TESTED	9.9	-	13.6	4.3	13.3	20.8	14.3	10.0	5.3	13.3
RECEIVED APPROVAL TO IMPLEMENT	2.9	-	-	2.2	-	12.5	-	-	5.3	-
ACTUALLY IMPLEMENTED	16.9	14.3	13.6	8.7	20.0	8.3	28.6	10.0	15.8	60.0
CHANGED ROUTINE BUSINESS PRACTICES	8.1	28.6	13.6	2.2	6.7	4.2	-	10.0	15.8	-

NOTE: UNWEIGHTED DATA

TABLE 36A
CHARACTERISTICS OF COMPANIES WHO HAVE ACTUALLY IMPLEMENTED OR CHANGED ROUTINE BUSINESS PRACTICES TO COMPUTERIZED SPACE MANAGEMENT

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	43	7	7	5	4	2	5	11	2
MEDIAN ANNUAL SALES GROWTH	8.6%	8.2%	8.9%	5.0%	25.1%		5.5%	9.5%	
MEDIAN IDENTICAL STORES GROWTH	5.6%	6.5%	8.9%	4.4%	15.3%		5.0%	4.5%	
MEDIAN SALES PER SQUARE FOOT	$10.12	$6.50	$12.00	$9.92	$10.39		$9.91	$10.79	
MEDIAN SALES PER LABOR HOUR	$95.50	$75.00	$95.00	$104.21	$122.62		$90.65	$109.10	
MEDIAN AVERAGE NUMBER OF ITEMS	21000	15500	21000	20500	18250		15250	27000	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 36B
CHARACTERISTICS OF COMPANIES WHO HAVE ACTUALLY IMPLEMENTED OR CHANGED ROUTINE BUSINESS PRACTICES TO COMPUTERIZED SPACE MANAGEMENT

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	43	10	10	6	17	20	23
MEDIAN ANNUAL SALES GROWTH	8.6%	9.5%	7.1%	3.0%	9.5%	8.1%	8.7%
MEDIAN IDENTICAL STORES GROWTH	5.6%	9.5%	6.7%	4.3%	4.9%	7.6%	4.9%
MEDIAN SALES PER SQUARE FOOT	$10.12	$7.70	$10.98	$7.80	$10.49	$10.03	$10.36
MEDIAN SALES PER LABOR HOUR	$95.50	$80.49	$109.25	$87.00	$102.09	$95.50	$95.99
MEDIAN AVERAGE NUMBER OF ITEMS	21000	16000	21500	24583	21000	18000	23000

TABLE 36C
CHARACTERISTICS OF COMPANIES WHO HAVE ACTUALLY IMPLEMENTED OR CHANGED ROUTINE BUSINESS PRACTICES TO COMPUTERIZED SPACE MANAGEMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	43	6	6	5	4	3	2	2	6	9
MEDIAN ANNUAL SALES GROWTH	8.6%	13.0%	6.7%	9.1%	8.6%				8.6%	5.2%
MEDIAN IDENTICAL STORES GROWTH	5.6	9.9	5.0	9.1	7.9				5.0%	3.2%
MEDIAN SALES PER SQUARE FOOT	$10.12	$14.96	$13.02	$8.43	$7.68				$10.20	$10.07
MEDIAN SALES PER LABOR HOUR	$95.50	$95.00	$108.31	$73.00	$84.58				$116.30	$109.10
MEDIAN AVERAGE NUMBER OF ITEMS	21000	25500	30000	17500	19400				29500	9000

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 37A
PERCENTAGE OF COMPANIES USING COMPUTERIZED SPACE MANAGEMENT FOR:

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES USING SPACE MANAGEMENT	92	24	16	12	7	5	7	16	5
HEADQUARTERS	30.4%	-	12.5%	33.3%	42.9%	40.0%	71.4%	56.3%	60.0%
STORE CLUSTERS	19.6	-	6.3	16.7	42.9	-	42.9	43.8	40.0
INDIVIDUAL STORES	32.6	4.2	25.0	58.3	28.6	40.0	28.6	56.3	60.0

TABLE 37B
PERCENTAGE OF COMPANIES USING COMPUTERIZED SPACE MANAGEMENT FOR:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES USING SPACE MANAGEMENT	92	31	20	13	28	51	41
HEADQUARTERS	30.4%	-	30.0%	38.5%	60.7%	11.8%	53.7%
STORE CLUSTERS	19.6	-	20.0	15.4	42.9	7.8	34.1
INDIVIDUAL STORES	32.6	-	55.0	46.2	46.4	21.6	46.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 37C
PERCENTAGE OF COMPANIES USING COMPUTERIZED SPACE MANAGEMENT FOR:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES USING SPACE MANAGEMENT	92	8	13	15	9	14	4	4	13	12
HEADQUARTERS	30.4%	25.0%	7.7%	6.7%	33.3%	35.7%	50.0%	25.0%	38.5%	66.7%
STORE CLUSTERS	19.6	12.5	23.1	6.7	-	7.1	25.0	-	30.8	58.3
INDIVIDUAL STORES	32.6	50.0	30.8	13.3	22.2	28.6	75.0	25.0	23.1	58.3

TABLE 38A
LEVELS OF EXPERIENCE WITH DIRECT PRODUCT PROFIT

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	175	64	31	25	15	9	9	16	6
NO EXPERIENCE	65.7%	78.1%	83.9%	60.0%	53.3%	66.7%	33.3%	31.3%	33.3%
INVESTIGATED	18.9	12.5	9.7	28.0	33.3	22.2	22.2	31.3	16.7
TESTED	6.9	4.7	-	4.0	-	11.1	44.4	18.8	-
RECEIVED APPROVAL TO IMPLEMENT	-	-	-	-	-	-	-	-	-
ACTUALLY IMPLEMENTED	6.9	3.1	6.5	8.0	13.3	-	-	12.5	33.3
CHANGED ROUTINE BUSINESS PRACTICES	1.7	1.6	-	-	-	-	-	6.3	16.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 38B
LEVELS OF EXPERIENCE WITH DIRECT PRODUCT PROFIT

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	175	74	43	26	32	117	58
NO EXPERIENCE	65.7%	79.7%	67.4%	57.7%	37.5%	75.2%	46.6%
INVESTIGATED	18.9	10.8	23.3	26.9	25.0	15.4	25.9
TESTED	6.9	4.1	-	7.7	21.9	2.6	15.5
RECEIVED APPROVAL TO IMPLEMENT	-	-	-	-	-	-	-
ACTUALLY IMPLEMENTED	6.9	4.1	9.3	7.7	9.4	6.0	8.6
CHANGED ROUTINE BUSINESS PRACTICES	1.7	1.4	-	-	6.3	.9	3.4

TABLE 38C
LEVELS OF EXPERIENCE WITH DIRECT PRODUCT PROFIT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	175	14	22	47	13	24	9	11	19	16
NO EXPERIENCE	65.7%	57.1%	50.0%	83.0%	76.9%	66.7%	55.6%	63.6%	57.9%	50.0%
INVESTIGATED	18.9	7.1	31.8	12.8	-	20.8	33.3	18.2	26.3	25.0
TESTED	6.9	7.1	9.1	4.3	15.4	4.2	-	18.2	-	12.5
RECEIVED APPROVAL TO IMPLEMENT	-	-	-	-	-	-	-	-	-	-
ACTUALLY IMPLEMENTED	6.9	21.4	9.1	-	7.7	4.2	11.1	-	10.5	12.5
CHANGED ROUTINE BUSINESS PRACTICES	1.7	7.1	-	-	-	4.2	-	-	5.3	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 39A
PERCENTAGE OF COMPANIES USING DIRECT PRODUCT PROFIT FOR:

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES USING DIRECT PRODUCT PROFIT	60	14	5	10	7	3	6	11	4
HEADQUARTERS	26.7%	7.1%	-	30.0%	42.9%		66.7%	36.4%	25.0%
STORE CLUSTERS	13.3	-	-	10.0	42.9		16.7	9.1	50.0
INDIVIDUAL STORES	25.0	7.1	20.0	30.0	14.3		16.7	45.5	50.0
DISTRIBUTION CENTER	11.7	-	-	-	42.9		-	27.3	25.0

TABLE 39B
PERCENTAGE OF COMPANIES USING DIRECT PRODUCT PROFIT FOR:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES USING DIRECT PRODUCT PROFIT	60	15	14	11	20	29	31
HEADQUARTERS	26.7%	-	21.4%	36.4%	45.0%	10.3%	41.9%
STORE CLUSTERS	13.3	-	14.3	18.2	20.0	6.9	19.4
INDIVIDUAL STORES	25.0	-	42.9	18.2	35.0	20.7	29.0
DISTRIBUTION CENTER	11.7	-	14.3	18.2	15.0	6.9	16.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 39C

PERCENTAGE OF COMPANIES USING DIRECT PRODUCT PROFIT FOR:

	GEOGRAPHIC REGION OF HEADQUARTERS									
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES USING DIRECT PRODUCT PROFIT	60	6	11	8	3	8	4	4	8	8
HEADQUARTERS	26.7%	16.7%	9.1%	25.0%		25.0%	50.0%	-	12.5%	50.0%
STORE CLUSTERS	13.3	-	9.1	-		12.5	25.0	-	37.5	25.0
INDIVIDUAL STORES	25.0	66.7	18.2	-		12.5	50.0	25.0	25.0	25.0
DISTRIBUTION CENTER	11.7	33.3	-	12.5		-	-	-	-	50.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 40
CHARACTERISTICS OF COMPANIES WHO HAVE ACTUALLY IMPLEMENTED OR CHANGED ROUTINE BUSINESS PRACTICES DUE TO DIRECT PRODUCT PROFIT

	ALL COMPANIES
TOTAL COMPANIES	15
MEDIAN ANNUAL SALES GROWTH	11.9
MEDIAN IDENTICAL STORES GROWTH	9.9
MEDIAN SALES PER SQUARE FOOT	10.88
MEDIAN SALES PER LABOR HOUR	98.54
MEDIAN AVERAGE NUMBER OF ITEMS	20000

TABLE 41
PERCENTAGE OF COMPANIES USING DIRECT PRODUCT PROFIT IN CONJUNCTION WITH COMPUTERIZED SPACE MANAGEMENT

	ALL COMPANIES
TOTAL COMPANIES	17
COMPANIES IN TOP IDENTICAL STORE GROWTH	29.4
COMPANIES IN TOP SALES PER SQUARE FOOT	41.2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 42
PROFILE OF PARTICIPANTS - GEOGRAPHIC REGION OF WHOLESALE HEADQUARTERS

		1989 WHOLESALE SALES (IN MILLIONS OF DOLLARS)				WHOLESALE AFFILIATION			
	ALL WHOLESALE COMPANIES	UNDER $101	$101- $250	$251- $500	OVER $500	COOPER- ATIVE	VOLUN- TARY	UN- AFFILIATED	COMBINED RETAIL/ WHOLESALE
TOTAL RESPONDENTS	42	6	5	4	27	13	18	2	9
NEW ENGLAND	19.0%	-	-	50.0%	22.2%	23.1%	27.8%		-
SOUTH	14.3	16.7	-	25.0	14.8	15.4	22.2		-
NORTH CENTRAL	28.6	50.0	-	-	33.3	30.8	38.9		11.1
WEST	7.1	16.7	-	-	7.4	15.4	-		-
CANADA	31.0	16.7	100.0	25.0	22.2	15.4	11.1		88.9

TABLE 43
MEDIAN PERCENTAGE CHANGE IN WHOLESALE SALES, 1988 VS. 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	8.8%	4.8%	11.4%	40
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER $101	0	-4.8	3.4	6
$101 - $250	11.3	10.7	11.7	5
$251 - $500	7.5	3.7	12.0	4
OVER $500	8.8	5.8	11.1	25
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	10.0	5.0	14.3	7
SOUTH	5.8	2.3	9.2	6
NORTH CENTRAL	7.5	0	8.8	11
WEST				3
CANADA	11.3	5.8	12.6	13
NUMBER OF STORES SERVED				
UNDER 50	5.0	-4.8	10.7	6
51 - 100	11.3	5.8	14.4	5
OVER 100	8.8	5.0	11.3	24

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 44
SERVICES PROVIDED TO MEMBERSHIP

	ALL WHOLESALE COMPANIES	1989 WHOLESALE SALES (IN MILLIONS OF DOLLARS)				WHOLESALE AFFILIATION			
		UNDER $101	$101-$250	$251-$500	OVER $500	COOPER-ATIVE	VOLUN-TARY	UN-AFFILIATED	COMBINED RETAIL/WHOLESALE
TOTAL RESPONDENTS	42	6	5	4	27	13	18	2	9
ELECTRONIC ORDERING	71.4%	83.3%	80.0%	25.0%	74.1%	69.2%	61.1%		88.9%
STORE PLANNING AND ENGINEERING	69.0	66.7	80.0	25.0	74.1	69.2	61.1		88.9
INDIVIDUAL RETAIL PRICING PROGRAM	66.7	50.0	80.0	25.0	74.1	69.2	50.0		100.0
HANDLE PRIVATE LABEL	66.7	50.0	80.0	25.0	74.1	61.5	61.1		88.9
PRODUCT MOVEMENT DATA	61.9	83.3	60.0	25.0	63.0	69.2	61.1		44.4
REAL ESTATE/SITE DEVELOPMENT	61.9	33.3	80.0	25.0	70.4	61.5	50.0		88.9
INTERIOR DESIGN AND DECOR SUPPORT	61.9	33.3	100.0	25.0	66.7	53.8	50.0		100.0
RETAIL ACCOUNTING	59.5	33.3	100.0	25.0	63.0	38.5	55.6		100.0
SCANNING SUPPORT	59.5	16.7	80.0	-	74.1	69.2	44.4		88.9
EDUCATIONAL TRAINING PROGRAMS	59.5	33.3	80.0	25.0	66.7	69.2	38.9		88.9
EQUIPMENT AND FIXTURE FINANCING	59.5	33.3	60.0	25.0	70.4	53.8	55.6		77.8
HANDLE GENERIC LABEL	57.1	50.0	60.0	25.0	63.0	46.2	55.6		77.8
EQUIPMENT FINANCING	57.1	33.3	60.0	25.0	66.7	53.8	50.0		77.8
MEMBER PAYROLL	54.8	33.3	80.0	25.0	59.3	46.2	50.0		77.8
GROSS MARGIN REPORT BY ITEM	52.4	33.3	40.0	25.0	63.0	61.5	44.4		55.6
DSD SYSTEM	47.6	16.7	20.0	-	66.7	46.2	44.4		66.7
LEASE FINANCING	47.6	-	60.0	25.0	59.3	46.2	33.3		77.8
INSURANCE	47.6	33.3	60.0	-	55.6	61.5	33.3		66.7
SPACE MANAGEMENT	42.9	-	40.0	-	59.3	46.2	33.3		66.7
INDUSTRIAL RELATIONS SUPPORT	42.9	-	80.0	25.0	48.1	53.8	16.7		77.8
LABOR CONTROL SUPPORT	38.1	-	40.0	25.0	48.1	38.5	27.8		55.6
CREDIT UNION	31.0	16.7	-	-	44.4	30.8	27.8		44.4
ELECTRONIC FUNDS TRANSFER, e.g. ATM, DIRECT DEBIT CARDS, ETC.	26.2	16.7	20.0	-	33.3	23.1	22.2		44.4

NOTE: MULTIPLE RESPONSES ALLOWED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 45
PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO - SUMMARY OF MEANS

	ALL WHOLESALE COMPANIES	1989 WHOLESALE SALES (IN MILLIONS OF DOLLARS) UNDER $101	$101- $250	$251- $500	OVER $500	WHOLESALE AFFILIATION COOPER- ATIVE	VOLUN- TARY	UN- AFFILIATED	COMBINED RETAIL/ WHOLESALE
TOTAL RESPONDENTS	25	4	5	1	15	8	7	2	8
INDEPENDENT FOOD STORES	56.8%	88.3%	56.5%		56.8%	88.3%	45.5%		33.1%
COMPANY OWNED STORES	20.7	0	12.5		21.0	3.5	.4		45.8
OTHER FOOD CHAINS (11+ STORES)	13.4	6.6	1.5		14.0	5.9	46.4		5.4
CONVENIENCE STORES	6.7	5.1	21.4		5.8	2.1	6.8		10.2
FOOD SERVICE/INSTITUTIONAL SERVICE	2.5	0	8.0		2.4	.2	.9		5.5

NOTE: DATA WEIGHTED BY 1989 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 46A
PROFILE OF RESPONDENTS BY COMPANY

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	98	5	10	19	11	12	9	2	10	20
RETAILERS	46.9%	80.0%	30.0%	52.6%	45.5%	50.0%	44.4%		60.0%	30.0%
COOPERATIVE WHOLESALERS	11.2	-	10.0	5.3	18.2	8.3	22.2		20.0	10.0
VOLUNTARY WHOLESALERS	14.3	20.0	10.0	15.8	9.1	25.0	11.1		10.0	15.0
UNAFFILIATED WHOLESALERS	8.2	-	20.0	10.5	9.1	8.3	11.1		10.0	-
COMBINED RETAILER/ WHOLESALER	19.4	-	30.0	15.8	18.2	8.3	11.1		-	45.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 46B
PROFILE OF RESPONDENTS BY COMPANY

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $50	$50-$99	$100-$149	$150-$249	$250-$499	$500-$1 BIL	$1-$3 BIL	OVER $3 BIL
TOTAL COMPANIES	98	3	8	1	9	14	18	33	12
RETAILERS	46.9%		12.5%		22.2%	35.7%	55.6%	51.5%	75.0%
COOPERATIVE WHOLESALERS	11.2		12.5		11.1	21.4	16.7	9.1	-
VOLUNTARY WHOLESALERS	14.3		62.5		11.1	-	16.7	12.1	8.3
UNAFFILIATED WHOLESALERS	8.2		12.5		-	28.6	5.6	3.0	-
COMBINED RETAILER/ WHOLESALER	19.4		-		55.6	14.3	5.6	24.2	16.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 47

PERCENTAGE OF DRY GROCERY CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1989

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL DRY GROCERY DISTRIBUTION CENTERS	285	9	11	44	37	30	43	7	24	80
PERCENTAGE OF DRY GROCERY CENTERS WITH STANDARDS IN 1989	40.0%	77.8%	45.5%	50.0%	35.1%	16.7%	55.8%	-	75.0%	25.0%
ALL RETAIL DRY GROCERY DISTRIBUTION CENTERS WITH STANDARDS IN 1989	102	7	2	26	6	23	5	7	20	6
PERCENTAGE OF RETAIL CENTERS WITH STANDARDS IN 1989	37.3	71.4	50.0	30.8	66.7	4.3	40.0	-	75.0	33.3
ALL COOPERATIVE WHOLESALER DRY GROCERY DISTRIBUTION CENTERS WITH STANDARDS IN 1989	19	0	1	2	3	1	2	0	2	8
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS WITH STANDARDS IN 1989	68.4	-	100.0	100.0	66.7	100.0	100.0	-	100.0	37.5
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS WITH STANDARDS IN 1989	78	2	1	10	18	4	32	0	1	10
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS WITH STANDARDS IN 1989	48.7	100.0	100.0	100.0	27.8	25.0	56.3	-	-	10.0
ALL UNAFFILIATED WHOLESALER DRY GROCERY DISTRIBUTION CENTERS WITH STANDARDS IN 1989	12	0	1	2	4	1	3	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS WITH STANDARDS IN 1989	58.3	-	100.0	50.0	25.0	100.0	66.7	-	100.0	-
ALL COMBINED RETAILER/WHOLESALER DRY GROCERY DISTRIBUTION CENTERS WITH STANDARDS IN 1989	74	0	6	4	6	1	1	0	0	56
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS WITH STANDARDS IN 1989	24.3	-	16.7	25.0	16.7	100.0	-	-	-	25.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 48

PERCENTAGE OF DRY GROCERY CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1990

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL DRY GROCERY DISTRIBUTION CENTERS	285	9	11	44	37	30	43	7	24	80
PERCENTAGE OF DRY GROCERY CENTERS PLANNING STANDARDS IN 1990	12.3%	11.1%	-	11.4%	10.8%	-	11.6%	14.3%	16.7%	18.8%
ALL RETAIL DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	102	7	2	26	6	23	5	7	20	6
PERCENTAGE OF RETAIL CENTERS PLANNING STANDARDS IN 1990	13.7	14.3	-	19.2	16.7	-	40.0	14.3	15.0	16.7
ALL COOPERATIVE WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	19	0	1	2	3	1	2	0	2	8
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS PLANNING STANDARDS IN 1990	5.3	-	-	-	-	-	-	-	50.0	-
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	78	2	1	10	18	4	32	0	1	10
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS PLANNING STANDARDS IN 1990	2.6	-	-	-	-	-	6.3	-	-	-
ALL UNAFFILIATED WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	12	0	1	2	4	1	3	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS PLANNING STANDARDS IN 1990	16.7	-	-	-	25.0	-	33.3	-	-	-
ALL COMBINED RETAILER/WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	74	0	6	4	6	1	1	0	0	56
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS PLANNING STANDARDS IN 1990	21.6	-	-	-	33.3	-	-	-	-	25.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 49

PERCENTAGE OF DRY GROCERY CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1991

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL DRY GROCERY DISTRIBUTION CENTERS	285	9	11	44	37	30	43	7	24	80
PERCENTAGE OF DRY GROCERY CENTERS PLANNING STANDARDS IN 1991	11.6%	-	-	13.6%	13.5%	3.3%	7.0%	-	8.3%	20.0%
ALL RETAIL DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	102	7	2	26	6	23	5	7	20	6
PERCENTAGE OF RETAIL CENTERS PLANNING STANDARDS IN 1991	7.8	-	-	19.2	-	4.3	20.0	-	5.0	-
ALL COOPERATIVE WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	19	0	1	2	3	1	2	0	2	8
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS PLANNING STANDARDS IN 1991	10.5	-	-	-	33.3	-	-	-	50.0	-
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	78	2	1	10	18	4	32	0	1	10
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS PLANNING STANDARDS IN 1991	2.6	-	-	-	-	-	6.3	-	-	-
ALL UNAFFILIATED WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	12	0	1	2	4	1	3	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS PLANNING STANDARDS IN 1991	8.3	-	-	-	25.0	-	-	-	-	-
ALL COMBINED RETAILER/WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	74	0	6	4	6	1	1	0	0	56
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS PLANNING STANDARDS IN 1991	27.0	-	-	25.0	50.0	-	-	-	-	28.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 50

PERCENTAGE OF DRY GROCERY CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1992

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL DRY GROCERY DISTRIBUTION CENTERS	285	9	11	44	37	30	43	7	24	80
PERCENTAGE OF DRY GROCERY CENTERS PLANNING STANDARDS IN 1992	11.2%	-	-	4.5%	5.4%	3.3%	4.7%	-	4.2%	30.0%
ALL RETAIL DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	102	7	2	26	6	23	5	7	20	6
PERCENTAGE OF RETAIL CENTERS PLANNING STANDARDS IN 1992	1.0	-	-	3.8	-	-	-	-	-	-
ALL COOPERATIVE WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	19	0	1	2	3	1	2	0	2	8
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS PLANNING STANDARDS IN 1992	5.3	-	-	-	-	-	-	-	50.0	-
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	78	2	1	10	18	4	32	0	1	10
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS PLANNING STANDARDS IN 1992	14.1	-	-	-	-	25.0	6.3	-	-	80.0
ALL UNAFFILIATED WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	12	0	1	2	4	1	3	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS PLANNING STANDARDS IN 1992	8.3	-	-	-	25.0	-	-	-	-	-
ALL COMBINED RETAILER/WHOLESALER DRY GROCERY DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	74	0	6	4	6	1	1	0	0	56
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS PLANNING STANDARDS IN 1992	24.3	-	-	25.0	16.7	-	-	-	-	28.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1992

TABLE 51

PERCENTAGE OF PERISHABLE CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1989

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL PERISHABLE DISTRIBUTION CENTERS	227	9	14	42	30	31	13	7	28	53
PERCENTAGE OF PERISHABLE CENTERS WITH STANDARDS IN 1989	38.8%	77.8%	57.1%	47.6%	40.0%	3.2%	76.9%	-	67.9%	20.8%
ALL RETAIL PERISHABLE DISTRIBUTION CENTERS WITH STANDARDS IN 1989	112	8	3	24	6	25	7	7	23	9
PERCENTAGE OF RETAIL CENTERS WITH STANDARDS IN 1989	35.7	75.0	33.3	29.2	66.7	-	71.4	-	73.9	-
ALL COOPERATIVE WHOLESALER PERISHABLE DISTRIBUTION CENTERS WITH STANDARDS IN 1989	15	0	4	2	3	1	2	0	2	1
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS WITH STANDARDS IN 1989	80.0	-	100.0	100.0	66.7	-	100.0	-	50.0	100.0
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS WITH STANDARDS IN 1989	41	1	1	9	16	3	2	0	2	7
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS WITH STANDARDS IN 1989	46.3	100.0	100.0	100.0	31.3	33.3	100.0	-	-	-
ALL UNAFFILIATED WHOLESALER PERISHABLE DISTRIBUTION CENTERS WITH STANDARDS IN 1989	11	0	2	2	4	0	2	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS WITH STANDARDS IN 1989	45.5	-	50.0	50.0	25.0	-	50.0	-	100.0	-
ALL COMBINED RETAILER/WHOLESALER PERISHABLE DISTRIBUTION CENTERS WITH STANDARDS IN 1989	48	0	4	5	1	2	0	0	0	36
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS WITH STANDARDS IN 1989	25.0	-	25.0	20.0	-	-	-	-	-	27.8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 52
PERCENTAGE OF PERISHABLE CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1990

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL PERISHABLE DISTRIBUTION CENTERS	227	9	14	42	30	31	13	7	28	53
PERCENTAGE OF PERISHABLE CENTERS PLANNING STANDARDS IN 1990	12.3%	22.2%	-	14.3%	10.0%	9.7%	23.1%	14.3%	10.7%	13.2%
ALL RETAIL PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	112	8	3	24	6	25	7	7	23	9
PERCENTAGE OF RETAIL CENTERS PLANNING STANDARDS IN 1990	16.1	25.0	-	25.0	16.7	8.0	28.6	14.3	13.0	11.1
ALL COOPERATIVE WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	15	0	4	2	3	1	2	0	2	1
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS PLANNING STANDARDS IN 1990	-	-	-	-	-	-	-	-	-	-
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	41	1	1	9	16	3	2	0	2	7
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS PLANNING STANDARDS IN 1990	-	-	-	-	-	-	-	-	-	-
ALL UNAFFILIATED WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	11	0	2	2	4	0	2	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS PLANNING STANDARDS IN 1990	18.2	-	-	-	25.0	-	50.0	-	-	-
ALL COMBINED RETAILER/WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1990	48	0	4	5	1	2	0	0	0	36
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS PLANNING STANDARDS IN 1990	16.7	-	-	-	100.0	50.0	-	-	-	16.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 53

PERCENTAGE OF PERISHABLE CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1991

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL PERISHABLE DISTRIBUTION CENTERS	227	9	14	42	30	31	13	7	28	53
PERCENTAGE OF PERISHABLE CENTERS PLANNING STANDARDS IN 1991	10.1%	11.1%	7.1%	16.7%	3.3%	9.7%	7.7%	-	3.6%	15.1%
ALL RETAIL PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	112	8	3	24	6	25	7	7	23	9
PERCENTAGE OF RETAIL CENTERS PLANNING STANDARDS IN 1991	9.8	12.5	33.3	20.8	-	8.0	14.3	-	4.3	-
ALL COOPERATIVE WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	15	0	4	2	3	1	2	0	2	1
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS PLANNING STANDARDS IN 1991	-	-	-	-	-	-	-	-	-	-
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	41	1	1	9	16	3	2	0	2	7
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS PLANNING STANDARDS IN 1991	-	-	-	-	-	-	-	-	-	-
ALL UNAFFILIATED WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	11	0	2	2	4	0	2	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS PLANNING STANDARDS IN 1991	9.1	-	-	-	25.0	-	-	-	-	-
ALL COMBINED RETAILER/ WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1991	48	0	4	5	1	2	0	0	0	36
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS PLANNING STANDARDS IN 1991	22.9	-	-	40.0	-	50.0	-	-	-	22.2

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 54

PERCENTAGE OF PERISHABLE CENTERS IMPLEMENTING ENGINEERED LABOR STANDARDS IN 1992

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL PERISHABLE DISTRIBUTION CENTERS	227	9	14	42	30	31	13	7	28	53
PERCENTAGE OF PERISHABLE CENTERS PLANNING STANDARDS IN 1992	10.1%	-	-	2.4%	6.7%	3.2%	15.4%	-	7.1%	28.3%
ALL RETAIL PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	112	8	3	24	6	25	7	7	23	9
PERCENTAGE OF RETAIL CENTERS PLANNING STANDARDS IN 1992	1.8	-	-	-	-	-	28.6	-	-	-
ALL COOPERATIVE WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	15	0	4	2	3	1	2	0	2	1
PERCENTAGE OF COOPERATIVE WHOLESALER CENTERS PLANNING STANDARDS IN 1992	6.7	-	-	-	33.3	-	-	-	-	-
ALL VOLUNTARY WHOLESALER DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	41	1	1	9	16	3	2	0	2	7
PERCENTAGE OF VOLUNTARY WHOLESALER CENTERS PLANNING STANDARDS IN 1992	22.0	-	-	-	-	33.3	-	-	100.0	85.7
ALL UNAFFILIATED WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	11	0	2	2	4	0	2	0	1	0
PERCENTAGE OF UNAFFILIATED WHOLESALER CENTERS PLANNING STANDARDS IN 1992	9.1	-	-	-	25.0	-	-	-	-	-
ALL COMBINED RETAILER/WHOLESALER PERISHABLE DISTRIBUTION CENTERS PLANNING STANDARDS IN 1992	48	0	4	5	1	2	0	0	0	36
PERCENTAGE OF COMBINED RETAILER/WHOLESALER CENTERS PLANNING STANDARDS IN 1992	20.8	-	-	20.0	-	-	-	-	-	25.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS 1992

TABLE 55A
PROFILE OF RESPONDENTS BY CENTER

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	108	20	4	10	58	97	10
RETAILERS	37.0%	20.0%	25.0%	30.0%	36.2%	38.1%	30.0%
COOPERATIVE WHOLESALERS	12.0	-	25.0	10.0	17.2	13.4	-
VOLUNTARY WHOLESALERS	22.2	45.0	25.0	20.0	17.2	19.6	50.0
UNAFFILIATED WHOLESALERS	7.4	10.0	-	10.0	6.9	7.2	-
COMBINED RETAILER/ WHOLESALER	21.3	25.0	25.0	30.0	22.4	21.6	20.0

TABLE 55B
PROFILE OF RESPONDENTS BY CENTER

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	108	16	44	26	14	2	6	89	19
RETAILERS	37.0%	6.3%	36.4%	38.5%	50.0%		66.7%	37.1%	36.8%
COOPERATIVE WHOLESALERS	12.0	12.5	6.8	11.5	21.4		33.3	12.4	10.5
VOLUNTARY WHOLESALERS	22.2	6.3	25.0	30.8	28.6		-	21.3	26.3
UNAFFILIATED WHOLESALERS	7.4	6.3	6.8	15.4	-		-	5.6	15.8
COMBINED RETAILER/ WHOLESALER	21.3	68.8	25.0	3.8	-		-	23.6	10.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 56

MEDIAN NUMBER OF PEOPLE EMPLOYED IN RESPONDING CENTER WITH STANDARDS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	180	115	300	103
DISTRIBUTION CENTER VOLUME AT COST				
LESS THAN $100	91	43	190	20
$100 - $149	85	61	101	4
$150 - $249	146	114	170	10
OVER $250	228	165	352	57
TYPE OF SELECTION METHOD				
MANUAL/CONVENTIONAL	170	114	270	93
SELECT TO CONVEYOR	312	200	388	9
SIZE IN SQUARE FEET (IN THOUSANDS)				
UNDER 100	115	26	165	16
101 - 350	132	73	200	42
351 - 500	298	185	370	20
551 - 750	425	258	548	12
751 - 999				2
OVER 1 MILLION	365	200	848	6
GEOGRAPHIC REGION OF CENTERS				
NEW ENGLAND	233	200	573	7
MIDDLE ATLANTIC	312	160	350	5
EAST NORTH CENTRAL	250	125	388	17
WEST NORTH CENTRAL	168	83	269	12
SOUTHEAST	172	84	250	10
WEST SOUTH CENTRAL	195	139	297	10
MOUNTAIN				2
PACIFIC	210	130	344	15
CANADA	146	90	180	25

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 57

MEDIAN NUMBER OF SUPERMARKETS SERVED PER CENTER WITH STANDARDS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	88	46	166	104
DISTRIBUTION CENTER VOLUME AT COST				
LESS THAN $100	53	17	100	20
$100 - $149	33	17	68	4
$150 - $249	43	3	58	10
OVER $250	121	65	200	56
TYPE OF SELECTION METHOD				
MANUAL/CONVENTIONAL	90	45	162	93
SELECT TO CONVEYOR	102	79	170	10
SIZE IN SQUARE FEET (IN THOUSANDS)				
UNDER 100	40	8	150	16
101 - 350	60	30	90	43
351 - 500	120	75	191	21
551 - 750	194	140	250	11
751 - 999				2
OVER 1 MILLION	213	150	300	6
GEOGRAPHIC REGION OF CENTERS				
NEW ENGLAND	65	61	180	7
MIDDLE ATLANTIC	133	87	185	6
EAST NORTH CENTRAL	90	68	160	17
WEST NORTH CENTRAL	61	40	121	12
SOUTHEAST	84	5	119	10
WEST SOUTH CENTRAL	68	55	162	10
MOUNTAIN				2
PACIFIC	155	96	204	15
CANADA	45	29	150	25

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 58A

AVERAGE AGE OF ENGINEERED LABOR STANDARDS IN YEARS

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	100	17	3	7	58	90	9
AVERAGE AGE OF STANDARDS IN YEARS	6.3	6.1		5.6	6.7	6.6	3.8
PERCENTAGE OF CENTERS WITH STANDARDS IN THE FOLLOWING AGE GROUPS							
LESS THAN 1 YEAR	4.0%	5.9%		-	3.4%	3.3%	11.1%
1 - 2 YEARS	19.0	23.5		14.3	17.2	16.7	33.3
3 - 4 YEARS	23.0	5.9		42.9	22.4	23.3	22.2
5 - 6 YEARS	18.0	17.6		28.6	20.7	20.0	-
7 - 8 YEARS	12.0	23.5		-	12.1	10.0	33.3
9 - 10 YEARS	7.0	11.8		-	3.4	7.8	-
11 + YEARS	17.0	11.8		14.3	20.7	18.9	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 58B

AVERAGE AGE OF ENGINEERED LABOR STANDARDS IN YEARS

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	100	16	36	26	14	2	6	85	15
AVERAGE AGE OF STANDARDS IN YEARS	6.3	9.2	5.6	6.4	6.0		2.5	6.5	5.2
PERCENTAGE OF CENTERS WITH STANDARDS IN THE FOLLOWING AGE GROUPS									
LESS THAN 1 YEAR	4.0%	-	5.6%	-	7.1%		16.7%	3.5%	6.7%
1 - 2 YEARS	19.0	18.8	27.8	11.5	-		50.0	18.8	20.0
3 - 4 YEARS	23.0	6.3	27.8	26.9	28.6		16.7	24.7	13.3
5 - 6 YEARS	18.0	12.5	11.1	26.9	21.4		16.7	16.5	26.7
7 - 8 YEARS	12.0	12.5	8.3	7.7	35.7		-	11.8	13.3
9 - 10 YEARS	7.0	12.5	5.6	7.7	-		-	7.1	6.7
11 + YEARS	17.0	37.5	13.9	19.2	7.1		-	17.6	13.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 58C

AVERAGE AGE OF ENGINEERED LABOR STANDARDS IN YEARS

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	100	7	7	18	11	7	8	2	15	25
AVERAGE AGE OF STANDARDS IN YEARS	6.3	6.6	6.4	3.8	3.5	3.9	5.4		7.1	9.9
PERCENTAGE OF CENTERS WITH STANDARDS IN THE FOLLOWING AGE GROUPS										
LESS THAN 1 YEAR	4.0%	14.3%	-	5.6%	-	-	-		6.7%	-
1 - 2 YEARS	19.0	-	28.6	33.3	36.4	28.6	12.5		6.7	12.0
3 - 4 YEARS	23.0	-	-	27.8	36.4	42.9	12.5		33.3	20.0
5 - 6 YEARS	18.0	42.9	28.6	22.2	18.2	-	50.0		-	8.0
7 - 8 YEARS	12.0	14.3	28.6	5.6	9.1	28.6	12.5		13.3	8.0
9 - 10 YEARS	7.0	14.3	-	5.6	-	-	-		13.3	12.0
11 + YEARS	17.0	14.3	14.3	-	-	-	12.5		26.7	40.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 59A

TECHNIQUES USED IN DEVELOPING STANDARDS

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	104	18	4	9	57	94	9
TIME STUDY STOPWATCH	55.8%	38.9%	50.0%	44.4%	54.4%	55.3%	66.7%
PRE-DETERMINED STANDARDS	40.5	61.1	50.0	44.4	40.4	40.4	33.3
BOTH TIME STUDY STOPWATCH AND PRE-DETERMINED STANDARDS	3.8	-	-	11.1	5.3	4.3	-
OUTSIDE CONSULTANT	63.5	44.4	50.0	66.7	66.7	63.8	66.7
IN-HOUSE WITH COMPUTER SOFTWARE	23.1	33.3	-	22.2	17.5	20.2	44.4
IN-HOUSE WITH EMPLOYEE AND SUPERVISOR INPUT	38.5	50.0	50.0	44.4	42.1	38.3	44.4
UNION INPUT	8.7	22.2	25.0	-	7.0	6.4	33.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 59B
TECHNIQUES USED IN DEVELOPING STANDARDS

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	104	16	40	26	14	2	6	87	17
TIME STUDY STOPWATCH	55.8%	18.8%	52.5%	65.4%	71.4%		83.3%	60.9%	29.4%
PRE-DETERMINED STANDARDS	40.5	81.3	45.0	26.9	21.4		16.7	35.6	64.7
BOTH TIME STUDY STOPWATCH AND PRE-DETERMINED STANDARDS	3.8	-	2.5	7.7	7.1		-	3.4	5.9
OUTSIDE CONSULTANT	63.5	6.3	70.0	80.8	85.7		33.3	64.4	58.8
IN-HOUSE WITH COMPUTER SOFTWARE	23.1	18.8	25.0	23.1	28.6		16.7	24.1	17.6
IN-HOUSE WITH EMPLOYEE AND SUPERVISOR INPUT	38.5	87.5	27.5	38.5	7.1		66.7	35.6	52.9
UNION INPUT	8.7	6.3	5.0	19.2	7.1		-	10.3	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 59C
TECHNIQUES USED IN DEVELOPING STANDARDS

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	104	6	7	20	12	10	8	1	15	25
TIME STUDY STOPWATCH	55.8%	66.7%	85.7%	80.0%	50.0%	30.0%	75.0%		80.0%	16.0%
PRE-DETERMINED STANDARDS	40.5	33.3	14.3	20.0	50.0	60.0	25.0		13.3	76.0
BOTH TIME STUDY STOPWATCH AND PRE-DETERMINED STANDARDS	3.8	-	-	-	-	10.0	-		6.7	8.0
OUTSIDE CONSULTANT	63.5	100.0	85.7	90.0	75.0	80.0	62.5		66.7	12.0
IN-HOUSE WITH COMPUTER SOFTWARE	23.1	16.7	28.6	15.0	33.3	10.0	25.0		33.3	20.0
IN-HOUSE WITH EMPLOYEE AND SUPERVISOR INPUT	38.5	16.7	71.4	10.0	25.0	40.0	25.0		26.7	76.0
UNION INPUT	8.7	16.7	14.3	5.0	8.3	-	12.5		13.3	8.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 60A

PERCENTAGE OF CENTERS WITH STANDARDS INCLUDED IN THE UNION CONTRACT

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	90	16	4	8	48	81	9
PERCENTAGE WITH STANDARDS INCLUDED IN THE UNION CONTRACT	8.9%	18.8%	-	12.5%	8.3%	8.6%	11.1%

TABLE 60B

PERCENTAGE OF CENTERS WITH STANDARDS INCLUDED IN THE UNION CONTRACT

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	90	14	35	20	13	2	6	86	4
PERCENTAGE WITH STANDARDS INCLUDED IN THE UNION CONTRACT	8.9%	7.1%	8.6%	5.0%	15.4%		16.7%	9.3%	-

TABLE 60C

PERCENTAGE OF CENTERS WITH STANDARDS INCLUDED IN THE UNION CONTRACT

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	90	5	5	20	12	6	4	1	14	23
PERCENTAGE WITH STANDARDS INCLUDED IN THE UNION CONTRACT	8.9%	-	20.0%	15.0%	-	-	-		21.4%	4.3%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 61A
AREAS IN WHICH STANDARDS HAVE BEEN IMPLEMENTED

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	102	18	4	9	55	92	9
RECEIVING	49.0%	33.3%	75.0%	55.6%	49.1%	50.0%	33.3%
PUT AWAY AND REPLENISHMENT	57.8	44.4	75.0	55.6	60.0	58.7	44.4
LOADING	52.9	55.6	75.0	44.4	56.4	52.2	55.6
SELECTION	99.0	100.0	100.0	100.0	100.0	100.0	100.0

TABLE 61B
AREAS IN WHICH STANDARDS HAVE BEEN IMPLEMENTED

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	102	16	40	26	13	2	5	85	17
RECEIVING	49.0%	75.0%	45.0%	38.5%	38.5%		80.0%	48.2%	52.9%
PUT AWAY AND REPLENISHMENT	57.8	75.0	50.0	53.8	53.8		80.0	57.6	58.8
LOADING	52.9	87.5	42.5	46.2	38.5		80.0	51.8	58.8
SELECTION	99.0	100.0	97.5	100.0	100.0		100.0	100.0	94.1

TABLE 61C
AREAS IN WHICH STANDARDS HAVE BEEN IMPLEMENTED

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	102	6	7	19	12	10	8	1	14	25
RECEIVING	49.0%	83.3%	42.9%	15.8%	33.3%	60.0%	37.5%		35.7%	84.0%
PUT AWAY AND REPLENISHMENT	57.8	83.3	42.9	26.3	41.7	70.0	50.0		64.3	84.0
LOADING	52.9	83.3	42.9	15.8	41.7	80.0	50.0		28.6	84.0
SELECTION	99.0	100.0	100.0	100.0	100.0	100.0	87.5		100.0	100.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 62A
USES OF STANDARDS

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	102	18	4	9	55	92	9
TRACKING INDIVIDUAL PRODUCTIVITY	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
TRACK AREA PRODUCTIVITY	67.6	61.1	50.0	66.7	69.1	68.5	66.7
TRACK SHIFT PRODUCTIVITY	76.5	66.7	50.0	66.7	76.4	77.2	66.7
PLAN SHIFTS	63.7	66.7	25.0	66.7	54.5	62.0	77.8

TABLE 62B
USES OF STANDARDS

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	102	16	40	26	13	2	5	85	17
TRACKING INDIVIDUAL PRODUCTIVITY	100.0%	100.0%	100.0%	100.0%	100.0%		100.0%	100.0%	100.0%
TRACK AREA PRODUCTIVITY	67.6	75.0	57.5	73.1	61.5		100.0	70.6	52.9
TRACK SHIFT PRODUCTIVITY	76.5	75.0	67.5	80.8	84.6		100.0	77.6	70.6
PLAN SHIFTS	63.7	31.3	57.5	84.6	69.2		100.0	62.4	70.6

TABLE 62C
USES OF STANDARDS

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	102	6	7	19	12	10	8	1	14	25
TRACKING INDIVIDUAL PRODUCTIVITY	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		100.0%	100.0%
TRACK AREA PRODUCTIVITY	67.6	83.3	71.4	36.8	91.7	40.0	75.0		92.9	68.0
TRACK SHIFT PRODUCTIVITY	76.5	100.0	85.7	52.6	91.7	60.0	87.5		92.9	72.0
PLAN SHIFTS	63.7	100.0	71.4	57.9	91.7	40.0	100.0		78.6	32.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 63A
METHODS OF MEASURING EMPLOYEES AGAINST THE STANDARDS

	ALL CENTERS	DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
		UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	102	18	4	9	55	92	9
BY COMPUTER	77.5%	72.2%	75.0%	66.7%	78.2%	76.1%	88.9%
SUPERVISOR OBSERVATION	34.3	27.8	25.0	44.4	41.8	33.7	44.4
OTHER METHODS	8.8	5.6	-	22.2	7.3	8.7	11.1

TABLE 63B
METHODS OF MEASURING EMPLOYEES AGAINST THE STANDARDS

	ALL CENTERS	SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
		UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	102	16	40	26	13	2	5	85	17
BY COMPUTER	77.5%	31.3%	80.0%	88.5%	92.3%		100.0%	76.5%	82.4%
SUPERVISOR OBSERVATION	34.3	62.5	35.0	34.6	7.7		20.0	35.3	29.4
OTHER METHODS	8.8	6.3	7.5	11.5	7.7		20.0	8.2	11.8

TABLE 63C
METHODS OF MEASURING EMPLOYEES AGAINST THE STANDARDS

	ALL CENTERS	GEOGRAPHIC REGION OF CENTERS								
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	102	6	7	19	12	10	8	1	14	25
BY COMPUTER	77.5%	100.0%	85.7%	89.5%	100.0%	100.0%	75.0%		100.0%	28.0%
SUPERVISOR OBSERVATION	34.3	33.3	57.1	15.8	16.7	30.0	25.0		-	76.0
OTHER METHODS	8.8	-	14.3	21.1	8.3	-	12.5		-	8.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 64A
PERCENTAGE OF CENTERS WITH A TRAINING PROGRAM TO IMPLEMENT THE STANDARDS

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	106	19	4	10	57	96	9
PERCENTAGE WITH A TRAINING PROGRAM	87.7%	78.9%	50.0%	90.0%	89.5%	87.5%	88.9%

TABLE 64B
PERCENTAGE OF CENTERS WITH A TRAINING PROGRAM TO IMPLEMENT THE STANDARDS

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	106	16	42	26	14	2	6	88	18
PERCENTAGE WITH A TRAINING PROGRAM	87.7%	75.0%	83.3%	96.2%	92.9%		100.0%	88.6%	83.3%

TABLE 64C
PERCENTAGE OF CENTERS WITH A TRAINING PROGRAM TO IMPLEMENT THE STANDARDS

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	106	6	7	20	12	10	10	1	15	25
PERCENTAGE WITH A TRAINING PROGRAM	87.7%	100.0%	100.0%	90.0%	91.7%	90.0%	80.0%		100.0%	72.0%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 65A

PERCENTAGE OF CENTERS IN WHICH THE STANDARDS HAVE BEEN CHALLENGED BY OUTSIDE ARBITRATION

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	92	17	4	8	48	83	9
PERCENTAGE WHICH HAVE BEEN CHALLENGED	23.9%	11.8%	-	25.0%	27.1%	22.9%	33.3%

TABLE 65B

PERCENTAGE OF CENTERS IN WHICH THE STANDARDS HAVE BEEN CHALLENGED BY OUTSIDE ARBITRATION

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	92	14	36	24	12	1	5	84	8
PERCENTAGE WHICH HAVE BEEN CHALLENGED	23.9%	7.1%	13.9%	33.3%	41.7%		60.0%	25.0%	12.5%

TABLE 65C

PERCENTAGE OF CENTERS IN WHICH THE STANDARDS HAVE BEEN CHALLENGED BY OUTSIDE ARBITRATION

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	92	5	6	19	12	8	4	1	14	23
PERCENTAGE WHICH HAVE BEEN CHALLENGED	23.9%	80.0%	50.0%	26.3%	16.7%	12.5%	-		28.6%	8.7%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 66

MEDIAN PERCENTAGE OF IMPROVEMENT IN PRODUCTIVITY SINCE THE STANDARDS WERE IMPLEMENTED

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	20.0%	13.0%	30.0%	88
DISTRIBUTION CENTER VOLUME AT COST				
LESS THAN $100	20.0	13.0	27.5	16
$100 - $149	13.0	7.0	30.0	3
$150 - $249	12.0	10.0	15.0	9
OVER $250	20.0	13.0	30.0	47
TYPE OF SELECTION METHOD				
MANUAL/CONVENTIONAL	20.0	13.0	30.0	79
SELECT TO CONVEYOR	20.0	15.0	32.5	8
SIZE IN SQUARE FEET (IN THOUSANDS)				
UNDER 100	13.0	13.0	13.0	13
101 - 350	20.0	13.0	25.0	37
351 - 500	20.0	15.0	35.0	17
551 - 750	30.0	20.0	40.0	10
751 - 999				1
OVER 1 MILLION	20.0	20.0	21.0	5
GEOGRAPHIC REGION OF CENTERS				
NEW ENGLAND	22.5	20.0	32.5	4
MIDDLE ATLANTIC	20.0	16.0	20.0	6
EAST NORTH CENTRAL	25.0	20.0	35.0	18
WEST NORTH CENTRAL	21.0	15.0	30.0	11
SOUTHEAST	27.5	12.0	30.0	10
WEST SOUTH CENTRAL	22.5	13.0	35.0	8
MOUNTAIN				1
PACIFIC	20.0	15.0	30.0	11
CANADA	13.0	13.0	13.0	19

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 67A
PERCENTAGE OF CENTERS USING INCENTIVES FOR EMPLOYEES TO MEET THE STANDARDS

		DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
	ALL CENTERS	UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	102	19	3	10	54	92	9
PERCENTAGE OF CENTERS USING INCENTIVES	32.4%	26.3%		10.0%	37.0%	32.6%	33.3%
TYPES OF STANDARDS USED							
EXTRA PAY	97.0	100.0		100.0	100.0	96.7	100.0
TIME OFF	60.6	60.0		100.0	50.0	56.7	100.0

TABLE 67B
PERCENTAGE OF CENTERS USING INCENTIVES FOR EMPLOYEES TO MEET THE STANDARDS

		SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
	ALL CENTERS	UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	102	14	41	26	14	2	5	85	17
PERCENTAGE OF CENTERS USING INCENTIVES	32.4%	14.3%	29.3%	38.5%	42.9%		20.0%	29.4%	47.1%
TYPES OF STANDARDS USED									
EXTRA PAY	97.0	100.0	100.0	90.0	100.0		100.0	96.0	100.0
TIME OFF	60.6	50.0	58.3	70.0	66.7		-	72.0	25.0

TABLE 67C
PERCENTAGE OF CENTERS USING INCENTIVES FOR EMPLOYEES TO MEET THE STANDARDS

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	102	6	7	20	12	10	10	1	14	22
PERCENTAGE OF CENTERS USING INCENTIVES	32.4%	33.3%	28.6%	55.0%	-	60.0%	30.0%		57.1%	4.5%
TYPES OF STANDARDS USED										
EXTRA PAY	97.0	100.0	50.0	100.0	-	100.0	100.0		100.0	100.0
TIME OFF	60.6	100.0	100.0	72.7	-	33.3	33.3		62.5	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 68A
UPDATING OF STANDARDS

	ALL CENTERS	DISTRIBUTION CENTER VOLUME AT COST (VOLUME IN MILLIONS)				SELECTION METHOD	
		UNDER $100	$100-$149	$150-$249	OVER $250	MANUAL/ CONVENTIONAL	SELECT TO CONVEYOR
TOTAL CENTERS	106	19	4	10	57	96	9
PERCENTAGE OF CENTERS THAT UPDATE THEIR STANDARDS PERIODICALLY	85.8%	78.9%	75.0%	90.0%	93.0%	85.4%	88.9%
HOW OFTEN THE STANDARDS ARE UPDATED							
ANNUALLY	14.3	6.7	-	-	17.0	13.4	25.0
BI-ANNUALLY	6.6	-	-	11.1	7.5	6.1	-
QUARTERLY	1.1	-	-	-	1.9	1.2	-
MONTHLY	20.9	20.0	33.3	22.2	24.5	23.2	-
OTHER	56.0	73.3	66.7	66.7	47.2	54.9	75.0

TABLE 68B
UPDATING OF STANDARDS

	ALL CENTERS	SIZE OF CENTER IN SQUARE FEET (IN THOUSANDS)						UNIONIZATION (MAJORITY OF EMPLOYEES)	
		UNDER 100	101-350	351-550	551-750	751-999	OVER 1 MIL	MAJORITY UNIONIZED	MAJORITY NON-UNIONIZED
TOTAL CENTERS	106	16	42	26	14	2	6	88	18
PERCENTAGE OF CENTERS THAT UPDATE THEIR STANDARDS PERIODICALLY	85.8%	81.3%	81.0%	92.3%	85.7%		100.0%	87.5%	77.8%
HOW OFTEN THE STANDARDS ARE UPDATED									
ANNUALLY	14.3	-	8.8	33.3	8.3		16.7	13.0	21.4
BI-ANNUALLY	6.6	-	11.8	8.3	-		-	3.9	21.4
QUARTERLY	1.1	-	2.9	-	-		-	1.3	-
MONTHLY	20.9	76.9	11.8	-	16.7		50.0	24.7	-
OTHER	56.0	23.1	64.7	58.3	75.0		16.7	55.8	57.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 68C
UPDATING OF STANDARDS

		GEOGRAPHIC REGION OF CENTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	106	6	7	20	12	10	10	1	15	25
PERCENTAGE OF CENTERS THAT UPDATE THEIR STANDARDS PERIODICALLY	85.8%	100.0%	85.7%	90.0%	66.7%	90.0%	70.0%		100.0%	84.0%
HOW OFTEN THE STANDARDS ARE UPDATED										
ANNUALLY	14.3	-	33.3	5.6	-	22.2	42.9		26.7	-
BI-ANNUALLY	6.6	33.3	-	-	-	-	28.6		-	9.5
QUARTERLY	1.1	-	-	-	12.5	-	-		-	-
MONTHLY	20.9	-	16.7	-	37.5	-	-		6.7	66.7
OTHER	56.0	66.7	50.0	94.4	50.0	77.8	28.6		60.0	23.8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 69A
PROFILE OF RESPONDENTS - NUMBER OF STORES OPERATED

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	205	68	45	22	21	11	14	15	9
1 STORE OPERATORS	37.1%	88.2%	33.3%	4.5%	-	-	-	-	-
2 - 10 STORE COMPANIES	29.8	8.8	66.7	72.7	33.3	-	-	6.7	11.1
11 - 49 COMPANIES	15.6	1.5	-	22.7	57.1	72.7	35.7	6.7	-
50 + STORE COMPANIES	17.6	1.5	-	-	9.5	27.3	64.3	86.7	88.9
INDEPENDENTS (1 - 10 STORES)	66.8	97.1	100.0	77.3	33.3	-	-	6.7	11.1
CHAINS (11+ STORES)	33.2	2.9	-	22.7	66.7	100.0	100.0	93.3	88.9

TABLE 69B
PROFILE OF RESPONDENTS - NUMBER OF STORES OPERATED

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL	205	17	31	59	13	30	19	13	23
1 STORE OPERATORS	37.1%	35.3%	38.7%	45.8%	61.5%	30.0%	21.1%	23.1%	30.4%
2 - 10 STORE COMPANIES	29.8	41.2	19.4	30.5	15.4	23.3	26.3	53.8	39.1
11 - 49 COMPANIES	15.6	-	16.1	15.3	15.4	23.3	21.1	15.4	13.0
50 + STORE COMPANIES	17.6	23.5	25.8	8.5	7.7	23.3	31.6	7.7	17.4
INDEPENDENTS (1 - 10 STORES)	66.8	76.5	58.1	76.3	76.9	53.3	47.4	76.9	69.6
CHAINS (11+ STORES)	33.2	23.5	41.9	23.7	23.1	46.7	52.6	23.1	30.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 69C
PROFILE OF PARTICIPANTS - RETAIL SALES IN 1989

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL	205	76	61	32	36	137	68	11
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)								
UNDER $10	33.2%	78.9%	9.8%	3.1%	2.8%	48.2%	2.9%	9.1%
$10 - $30	22.0	19.7	49.2	-	-	32.8	-	-
$31 - $100	10.7	1.3	26.2	15.6	-	12.4	7.4	9.1
$101 - $250	10.2	-	11.5	37.5	5.6	5.1	20.6	18.2
$251 - $500	5.4	-	-	25.0	8.3	-	16.2	27.3
$501 - $1 BILLION	6.8	-	-	15.6	25.0	-	20.6	9.1
$1 BILLION - $3 BILLION	7.3	-	1.6	3.1	36.1	.7	20.6	9.1
OVER $3 BILLION	4.4	-	1.6	-	22.2	.7	11.8	18.2

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 70A
PROFILE OF PARTICIPANTS - COMPANIES WITH AN ADVERTISING DEPARTMENT OR FULL-TIME ADVERTISING PERSON

	ALL COMPANIES	COMPANIES WITH AN ADVERTISING DEPARTMENT	COMPANIES WITHOUT AN ADVERTISING DEPARTMENT
TOTAL	205	96	109
1 STORE OPERATORS	37.1%	-	69.7%
2 - 10 STORE COMPANIES	29.8	32.3	27.5
11 - 49 COMPANIES	15.6	30.2	2.8
50 + STORE COMPANIES	17.6	37.5	-
INDEPENDENTS (1 - 10 STORES)	66.8	32.3	97.2
CHAINS (11+ STORES)	33.2	67.7	2.8

TABLE 70B
PROFILE OF PARTICIPANTS - COMPANIES WITH AN ADVERTISING DEPARTMENT OR FULL-TIME ADVERTISING PERSON

	ALL COMPANIES	COMPANIES WITH AN ADVERTISING DEPARTMENT	COMPANIES WITHOUT AN ADVERTISING DEPARTMENT
TOTAL	205	96	109
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)			
UNDER $10	33.2%	4.2%	58.7%
$10 - $30	22.0	13.5	29.4
$31 - $100	10.7	14.6	7.3
$101 - $250	10.2	17.7	3.7
$251 - $500	5.4	11.5	-
$501 - $1 BILLION	6.8	14.6	-
$1 BILLION - $3 BILLION	7.3	15.6	-
OVER $3 BILLION	4.4	8.3	.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 71A
WHO DESIGNS NEWSPAPER ADS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	196	61	44	22	20	11	14	15	9
SOMEONE IN THE FIRM	60.2%	50.8%	52.3%	54.5%	60.0%	63.6%	92.9%	86.7%	77.8%
WHOLESALER	30.6	41.0	34.1	36.4	25.0	27.3	7.1	6.7	22.2
AD AGENCY	14.3	6.6	20.5	18.2	20.0	9.1	14.3	6.7	33.3
FREELANCE	2.6	-	4.5	9.1	-	-	7.1	-	-
NEWSPAPER	13.8	29.5	18.2	4.5	-	-	-	-	-

TABLE 71B
WHO DESIGNS NEWSPAPER ADS

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	196	69	59	32	36	128	68	11
SOMEONE IN THE FIRM	60.2%	52.2%	52.5%	75.0%	75.0%	52.3%	75.0%	9.1%
WHOLESALER	30.6	39.1	33.9	15.6	22.2	36.7	19.1	90.9
AD AGENCY	14.3	11.6	18.6	12.5	13.9	14.8	13.2	9.1
FREELANCE	2.6	-	5.1	3.1	2.8	2.3	2.9	-
NEWSPAPER	13.8	27.5	13.6	-	-	21.1	-	-

NOTE: MULTIPLE RESPONSES ACCEPTED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 72A
WHO HANDLES TV

	ALL COMPANIES	ANNUAL SALES IN MILLIONS UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	125	24	20	17	19	10	14	14	7
SOMEONE IN THE FIRM	44.8%	41.7%	50.0%	52.9%	47.4%	50.0%	57.1%	21.4%	28.6%
WHOLESALER	28.0	62.5	50.0	17.6	15.8	20.0	7.1	7.1	-
AD AGENCY	43.2	8.3	15.0	41.2	47.4	30.0	78.6	92.9	85.7
FREELANCE	1.6	-	-	5.9	-	-	7.1	-	-
NEWSPAPER	-	-	-	-	-	-	-	-	-

TABLE 72B
WHO HANDLES TV

	ALL COMPANIES	NUMBER OF STORES OPERATED 1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	125	27	35	29	34	62	63	10
SOMEONE IN THE FIRM	44.8%	40.7%	54.3%	58.6%	26.5%	48.4%	41.3%	10.0%
WHOLESALER	28.0	66.7	25.7	6.9	17.6	43.5	12.7	70.0
AD AGENCY	43.2	14.8	25.7	55.2	73.5	21.0	35.1	40.0
FREELANCE	1.6	-	2.9	-	2.9	1.6	1.6	-
NEWSPAPER	-	-	-	-	-	-	-	-

NOTE: MULTIPLE RESPONSES ACCEPTED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 73A
WHO HANDLES RADIO

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	162	44	30	20	19	11	14	15	9
SOMEONE IN THE FIRM	63.0%	68.2%	86.7%	65.0%	47.4%	63.6%	57.1%	40.0%	33.3%
WHOLESALER	15.4	25.0	16.7	10.0	15.8	9.1	7.1	6.7	11.1
AD AGENCY	33.3	11.4	6.7	40.0	42.1	36.4	71.4	73.3	66.7
FREELANCE	1.2	2.3	-	5.0	-	-	-	-	-
NEWSPAPER	.6	2.3	-	-	-	-	-	-	-

TABLE 73B
WHO HANDLES RADIO

	ALL COMPANIES	NUMBER OF STORES OPERATED						
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	162	45	50	31	36	95	67	11
SOMEONE IN THE FIRM	63.0%	68.9%	80.0%	58.1%	36.1%	74.7%	46.3%	27.3%
WHOLESALER	15.4	26.7	10.0	6.5	16.7	17.9	11.9	63.6
AD AGENCY	33.3	15.6	16.0	54.8	61.1	15.8	58.2	36.4
FREELANCE	1.2	2.2	2.0	-	-	2.1	-	-
NEWSPAPER	.6	2.2	-	-	-	1.1	-	-

NOTE: MULTIPLE RESPONSES ACCEPTED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 74A
WHO DESIGNS MAILERS/FLYERS

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	185	55	41	20	20	11	14	15	9
SOMEONE IN THE FIRM	56.2%	36.4%	51.2%	60.0%	60.0%	72.7%	85.7%	86.7%	66.7%
WHOLESALER	39.5	60.0	51.2	35.0	25.0	27.3	7.1	6.7	22.2
AD AGENCY	14.1	10.9	9.8	25.0	15.0	18.2	21.4	13.3	11.1
FREELANCE	4.3	3.6	4.9	5.0	5.0	-	14.3	-	-
NEWSPAPER	.5	-	2.4	-	-	-	-	-	-

TABLE 74B
WHO DESIGNS MAILERS/FLYERS

	ALL COMPANIES	NUMBER OF STORES OPERATED						
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	185	61	57	31	36	118	67	10
SOMEONE IN THE FIRM	56.2%	41.0%	49.1%	80.6%	72.2%	44.9%	76.1%	10.0%
WHOLESALER	39.5	55.7	47.4	16.1	19.4	51.7	17.9	80.0
AD AGENCY	14.1	13.1	15.8	16.1	11.1	14.4	13.4	10.0
FREELANCE	4.3	4.9	5.3	3.2	2.8	5.1	3.0	-
NEWSPAPER	.5	-	1.8	-	-	.8	-	-

NOTE: MULTIPLE RESPONSES ACCEPTED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 75A
MEDIAN PERCENTAGE OF ANNUAL SALES BUDGETED TO ADVERTISING - ALL COMPANIES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.1%	.9%	1.5%	190
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1.1	1.0	1.5	65
$10 - $30	1.2	1.0	1.5	43
$31 - $100	1.2	1.0	1.5	20
$101 - $250	1.1	.7	1.5	18
$251 - $500	1.0	.9	1.3	10
$501 - $1 BILLION	1.0	1.0	1.0	11
$1 BILLION - $3 BILLION	.8	.6	1.0	14
OVER $3 BILLION	1.4	1.1	1.5	9
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	1.4	1.0	1.5	15
MID ATLANTIC	1.3	1.0	1.5	30
EAST NORTH CENTRAL	1.0	.9	1.5	53
WEST NORTH CENTRAL	1.2	1.0	1.6	13
SOUTHEAST	1.1	.9	1.3	29
WEST SOUTH CENTRAL	1.2	1.0	1.5	18
MOUNTAIN	.8	.7	1.1	12
PACIFIC	1.3	.8	1.5	20
NUMBER OF STORES				
1 STORE	1.1	1.0	1.5	73
2 - 10 STORES	1.2	1.0	1.5	56
11 - 49 STORES	1.0	.9	1.4	30
50 + STORES	1.0	.8	1.3	31
INDEPENDENT (1-10 STORES)	1.2	1.0	1.5	129
CHAIN (11+ STORES)	1.0	.9	1.3	61
WHOLESALE RESPONDENTS	1.2	1.0	1.3	9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 75B

MEDIAN PERCENTAGE OF ANNUAL SALES BUDGETED TO ADVERTISING - COMPANIES WITH THEIR OWN ADVERTISING DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.0%	.9%	1.5%	85
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1.2	.8	1.9	4
$10 - $30	1.1	.9	1.5	12
$31 - $100	1.3	1.0	1.5	12
$101 - $250	1.1	.7	1.5	14
$251 - $500	1.0	.9	1.3	10
$501 - $1 BILLION	1.0	1.0	1.0	11
$1 BILLION - $3 BILLION	.8	.6	1.0	14
OVER $3 BILLION	1.3	1.0	1.5	8
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	1.5	.8	1.5	5
MID ATLANTIC	1.0	1.0	1.4	16
EAST NORTH CENTRAL	1.0	.9	1.1	19
WEST NORTH CENTRAL	1.0	.6	1.1	4
SOUTHEAST	1.2	.7	1.3	16
WEST SOUTH CENTRAL	1.1	1.0	1.3	10
MOUNTAIN	.8	.7	1.5	5
PACIFIC	1.4	.7	1.5	10
NUMBER OF STORES				
1 STORE				0
2 - 10 STORES	1.1	.9	1.5	27
11 - 49 STORES	1.0	.8	1.5	27
50 + STORES	1.0	.8	1.3	31
INDEPENDENT (1-10 STORES)	1.1	.9	1.5	27
CHAIN (11+ STORES)	1.0	.8	1.4	58
WHOLESALE RESPONDENTS	1.2	1.0	1.3	9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 75C

MEDIAN PERCENTAGE OF ANNUAL SALES BUDGETED TO ADVERTISING - COMPANIES WITHOUT THEIR OWN ADVERTISING DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.2%	1.0%	1.5%	105
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1.1	1.0	1.5	61
$10 - $30	1.3	1.0	1.5	31
$31 - $100	1.1	.9	1.3	8
$101 - $250	1.2	.9	1.5	4
$251 - $500				0
$501 - $1 BILLION				0
$1 BILLION - $3 BILLION				0
OVER $3 BILLION				1
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	1.3	1.0	1.5	10
MID ATLANTIC	1.4	1.3	1.6	14
EAST NORTH CENTRAL	1.2	1.0	1.5	34
WEST NORTH CENTRAL	1.5	1.2	1.7	9
SOUTHEAST	1.1	.9	1.3	13
WEST SOUTH CENTRAL	1.2	.8	1.6	8
MOUNTAIN	.8	.6	1.1	7
PACIFIC	1.1	.8	1.5	10
NUMBER OF STORES				
1 STORE	1.1	1.0	1.5	73
2 - 10 STORES	1.3	1.1	1.5	29
11 - 49 STORES				3
50 + STORES				0
INDEPENDENT (1-10 STORES)	1.2	1.0	1.5	102
CHAIN (11+ STORES)				3
WHOLESALE RESPONDENTS				0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 76A
PERCENTAGE OF FIRMS THAT INCLUDE CO-OP DOLLARS IN THEIR BUDGETS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	195	66	44	21	19	10	13	14	8
COMPANIES INCLUDING CO-OP DOLLARS	51.3%	50.0%	40.9%	61.9%	57.9%	80.0%	53.8%	28.6%	75.0%
COMPANIES NOT INCLUDING CO-OP DOLLARS	48.7	50.0	59.1	38.1	42.1	20.0	46.2	71.4	25.0

TABLE 76B
PERCENTAGE OF FIRMS THAT INCLUDE CO-OP DOLLARS IN THEIR BUDGETS

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	195	74	57	30	34	131	64	10
COMPANIES INCLUDING CO-OP DOLLARS	51.3%	45.9%	49.1%	70.0%	50.0%	47.3%	59.4%	80.0%
COMPANIES NOT INCLUDING CO-OP DOLLARS	48.7	54.1	50.9	30.0	50.0	52.7	40.6	20.0

SOURCE: FOOD MARKETING INSTITUTE. FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 77
MEDIAN PERCENTAGE OF ADVERTSING EXPENSES WHICH ARE CO-OP

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	10.0%	.5%	35.0%	74
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	5.0	.5	15.0	23
$10 - $30	.8	.3	7.5	12
$31 - $100	25.0	10.0	50.0	10
$101 - $250	11.5	2.6	40.0	8
$251 - $500	12.8	.5	25.0	6
$501 - $1 BILLION	52.2	32.8	80.0	6
$1 BILLION - $3 BILLION				3
OVER $3 BILLION	32.5	15.0	40.0	6
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND				3
MID ATLANTIC	15.0	5.0	35.0	9
EAST NORTH CENTRAL	22.5	.8	33.8	16
WEST NORTH CENTRAL	.5	.2	25.2	8
SOUTHEAST	7.5	.6	14.0	14
WEST SOUTH CENTRAL	25.0	.5	35.0	10
MOUNTAIN	30.0	5.0	55.0	5
PACIFIC	8.0	5.0	40.0	9
NUMBER OF STORES				
1 STORE	5.0	.5	10.0	23
2 - 10 STORES	10.0	.5	25.0	20
11 - 49 STORES	30.0	10.0	49.[illegible]	18
50 + STORES	30.0	1.1	40.0	13
INDEPENDENT (1-10 STORES)	5.0	.5	15.0	43
CHAIN (11+ STORES)	30.0	8.0	49.5	31
WHOLESALE RESPONDENTS	25.0	.6	50.0	6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 78A

AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	184	64	37	19	18	11	13	13	9
NEWSPAPER	52.6%	60.4%	47.8%	64.4%	41.7%	44.9%	44.1%	48.4%	41.6%
TARGETED MAILER/FLYER	27.4	25.3	33.4	18.4	35.9	17.9	25.4	28.0	34.0
RADIO	7.3	7.1	5.8	7.0	9.1	10.2	8.6	6.5	8.2
TELEVISION	6.8	1.9	3.2	7.6	10.2	16.0	17.8	11.1	13.9
IN-STORE COUPONS	2.2	2.6	3.9	.9	.4	5.5	.2	.2	.9
BILLBOARDS	.7	.8	.3	.6	1.0	1.5	.9	1.0	.3
OTHER	2.9	1.9	5.5	1.0	1.7	4.1	3.0	4.7	1.1

TABLE 78B

AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	184	13	25	56	12	29	17	11	21
NEWSPAPER	52.6%	46.4%	44.9%	58.0%	51.0%	50.9%	44.5%	58.7%	57.8%
TARGETED MAILER/FLYER	27.4	37.4	31.8	22.0	21.3	33.4	35.7	19.1	23.6
RADIO	7.3	3.7	6.6	8.8	9.3	6.0	5.8	8.7	7.9
TELEVISION	6.8	5.6	8.7	5.6	6.5	6.2	10.7	7.5	5.5
IN-STORE COUPONS	2.2	3.9	4.6	1.8	5.7	.5	.4	3.8	.7
BILLBOARDS	.7	.6	1.8	.6	.1	.4	.8	.6	.7
OTHER	2.9	2.3	1.7	3.2	6.2	2.6	2.1	1.5	3.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 78C
AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

	ALL COMPANIES	NUMBER OF STORES OPERATED 1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	184	68	52	32	32	120	64	10
NEWSPAPER	52.6%	58.5%	53.0%	48.1%	44.0%	56.1%	46.0%	41.1%
TARGETED MAILER/FLYER	27.4	27.3	29.4	23.3	28.6	28.2	25.9	31.0
RADIO	7.3	6.5	7.8	7.5	8.1	7.1	7.8	8.3
TELEVISION	6.8	1.8	3.0	14.9	15.2	2.3	15.0	15.7
IN-STORE COUPONS	2.2	2.5	3.1	2.1	.4	2.8	1.3	.1
BILLBOARDS	.7	.7	.4	1.2	.7	.6	1.0	1.3
OTHER	2.9	2.6	3.3	2.9	3.0	2.9	2.9	2.5

TABLE 78D
AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

	ALL COMPANIES	COMPANIES ADVERTISING ON RADIO	COMPANIES ADVERTISING ON TELEVISION	COMPANIES USING BOTH RADIO AND TV
TOTAL COMPANIES	184	98	78	76
NEWSPAPER	52.6%	49.1%	45.7%	45.7%
TARGETED MAILER/FLYER	27.4	25.9	26.2	26.0
RADIO	7.3	9.2	8.7	9.0
TELEVISION	6.8	10.9	14.1	14.1
IN-STORE COUPONS	2.2	1.6	1.5	1.5
BILLBOARDS	.7	.8	.9	1.0
OTHER	2.9	2.5	2.8	2.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 79A

PERCENTAGE OF COMPANIES INCLUDING THE FOLLOWING ITEMS IN THEIR ADVERTISING BUDGETS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
NEWSPAPER ADVERTISING	60.0%	13.2%	55.6%	95.5%	95.2%	100.0%	92.9%	100.0%	100.0%
DIRECT MAIL	53.7	14.7	53.3	72.7	85.7	72.7	92.9	93.3	77.8
RADIO AIR TIME	51.7	10.3	42.2	72.7	85.7	81.8	100.0	93.3	100.0
PRODUCTION	45.4	4.4	26.7	77.3	85.7	72.7	92.9	93.3	88.9
INSTITUIONAL ADVERTISING	42.9	5.9	26.7	68.2	66.7	90.9	92.9	93.3	66.7
TELEVISION AIR TIME	42.0	5.9	20.0	59.1	76.2	90.9	100.0	86.7	77.8
SIGNAGE	39.0	5.9	28.9	36.4	76.2	81.8	78.6	66.7	100.0
AD AGENCY FEES	32.7	2.9	17.8	45.5	52.4	63.6	85.7	80.0	55.6
PROMOTIONS	29.8	4.4	17.8	50.0	42.9	81.8	57.1	46.7	66.7
ADVERTISING PERSONNEL SALARIES	20.0	2.9	4.4	22.7	28.6	63.6	50.0	53.3	44.4
STORE COUPONS	16.6	7.4	24.4	18.2	14.3	36.4	21.4	26.7	-
CONSUMER RESEARCH	7.3	-	2.2	13.6	9.5	27.3	21.4	20.0	-
OTHER	5.9	2.9	4.4	9.1	9.5	-	14.3	13.3	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 79B
PERCENTAGE OF COMPANIES INCLUDING THE FOLLOWING ITEMS IN THEIR ADVERTISING BUDGETS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	205	17	31	59	13	30	19	13	23
NEWSPAPER ADVERTISING	60.0%	52.9%	64.5%	54.2%	38.5%	63.3%	68.4%	69.2%	69.6%
DIRECT MAIL	53.7	58.8	61.3	39.0	23.1	63.3	57.9	61.5	73.9
RADIO AIR TIME	51.7	35.3	58.1	44.1	38.5	56.7	63.2	69.2	56.5
PRODUCTION	45.4	41.2	58.1	33.9	23.1	50.0	52.6	46.2	60.9
INSTITUIONAL ADVERTISING	42.9	35.3	54.8	35.6	30.8	40.0	52.6	53.8	47.8
TELEVISION AIR TIME	42.0	23.5	51.6	37.3	30.8	43.3	52.6	53.8	43.5
SIGNAGE	39.0	47.1	51.6	28.8	15.4	40.0	47.4	30.8	52.2
AD AGENCY FEES	32.7	41.2	45.2	32.2	23.1	23.3	31.[illegible]	23.1	34.8
PROMOTIONS	29.8	29.4	29.0	25.4	15.4	26.7	52.6	15.4	43.5
ADVERTISING PERSONNEL SALARIES	20.0	11.8	22.6	13.6	7.7	26.7	10.5	30.8	39.1
STORE COUPONS	16.6	23.5	22.6	13.6	15.4	6.7	15.8	30.8	17.4
CONSUMER RESEARCH	7.3	-	3.2	3.4	-	6.7	10.5	15.4	26.1
OTHER	5.9	5.9	3.2	8.5	-	-	5.3	-	17.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 79C

PERCENTAGE OF COMPANIES INCLUDING THE FOLLOWING ITEMS IN THEIR ADVERTISING BUDGETS

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	205	76	61	32	36	137	68	11
NEWSPAPER ADVERTISING	60.0%	3.9%	86.9%	100.0%	97.2%	40.9%	98.5%	100.0%
DIRECT MAIL	53.7	5.3	75.4	93.8	83.3	36.5	88.2	63.6
RADIO AIR TIME	51.7	1.3	67.2	93.8	94.4	30.7	94.1	90.9
PRODUCTION	45.4	1.3	45.9	93.8	94.4	21.2	94.1	72.7
INSTITUTIONAL ADVERTISING	42.9	1.3	45.9	87.5	86.1	21.2	86.8	72.7
TELEVISION AIR TIME	42.0	1.3	36.1	93.8	91.7	16.8	92.6	81.8
SIGNAGE	39.0	3.9	41.0	78.1	75.0	20.4	76.5	81.8
AD AGENCY FEES	32.7	1.3	31.1	68.8	69.4	14.6	69.1	36.4
PROMOTIONS	29.8	2.6	32.8	62.5	52.8	16.1	57.4	63.6
ADVERTISING PERSONNEL SALARIES	20.0	1.3	9.8	50.0	50.0	5.1	50.0	45.5
STORE COUPONS	16.6	3.9	29.5	21.9	16.7	15.3	19.1	18.2
CONSUMER RESEARCH	7.3	-	4.9	25.0	11.1	2.2	17.6	-
OTHER	5.9	1.3	8.2	9.4	8.3	4.4	8.8	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 79D

PERCENTAGE OF COMPANIES INCLUDING THE FOLLOWING ITEMS IN THEIR ADVERTISING BUDGETS

	ALL COMPANIES	COMPANIES WITH AN ADVERTISING DEPARTMENT	COMPANIES WITHOUT AN ADVERTISING DEPARTMENT
TOTAL COMPANIES	205	96	109
NEWSPAPER ADVERTISING	60.0%	96.9%	27.5%
DIRECT MAIL	53.7	84.4	26.6
RADIO AIR TIME	51.7	87.5	20.2
PRODUCTION	45.4	85.4	10.1
INSTITUTIONAL ADVERTISING	42.9	79.2	11.0
TELEVISION AIR TIME	42.0	76.0	11.9
SIGNAGE	39.0	65.6	15.6
AD AGENCY FEES	32.7	58.3	10.1
PROMOTIONS	29.8	56.3	6.4
ADVERTISING PERSONNEL SALARIES	20.0	41.7	.9
STORE COUPONS	16.6	25.0	9.2
CONSUMER RESEARCH	7.3	15.6	-
OTHER	5.9	10.4	1.8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 80A

PERCENTAGE OF ADVERTISING DEPARTMENTS DOING THE FOLLOWING IN-HOUSE

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES WITH AN ADVERTISING DEPARTMENT	96	4	13	14	17	11	14	15	8
DESIGN PRINT ADS IN BLACK AND WHITE	86.5%	100.0%	76.9%	85.7%	82.4%	72.7%	92.9%	93.3%	100.0%
DESIGN PRINT ADS IN FOUR COLOR	64.6	50.0	23.1	64.3	58.8	54.5	85.7	86.7	87.5
TYPESETTING	49.0	50.0	-	14.3	47.1	81.8	71.4	60.0	87.5
WRITE SCRIPTS	49.0	100.0	30.8	50.0	70.6	54.5	42.9	46.7	12.5
DESIGN/PRODUCE COMPANY NEWSLETTERS	49.0	50.0	23.1	57.1	70.6	36.4	42.9	46.7	62.5
MEDIA BUYING	44.8	100.0	23.1	57.1	64.7	54.5	28.6	26.7	37.5
PHOTOGRAPHY	36.5	50.0	-	14.3	23.5	54.5	64.3	53.3	50.0
RADIO COMMERCIAL PRODUCTION	28.1	-	30.8	7.1	41.2	54.5	28.6	26.7	12.5
DEVELOP SLIDE PRESENTATIONS	27.1	25.0	7.7	14.3	23.5	27.3	50.0	26.7	50.0
TV COMMERCIAL PRODUCTION	18.8	-	15.4	7.1	17.6	18.2	42.9	20.0	12.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 80B

PERCENTAGE OF ADVERTISING DEPARTMENTS DOING THE FOLLOWING IN-HOUSE

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES WITH AN ADVERTISING DEPARTMENT	96	0	31	29	36	31	65	11
DESIGN PRINT ADS IN BLACK AND WHITE	86.5%		80.6%	79.3%	97.2%	80.6%	89.2%	90.9%
DESIGN PRINT ADS IN FOUR COLOR	64.6		45.2	58.6	86.1	45.2	73.8	63.6
TYPESETTING	49.0		12.9	48.3	80.6	12.9	66.2	72.7
WRITE SCRIPTS	49.0		51.6	62.1	36.1	51.6	47.7	63.6
DESIGN/PRODUCE COMPANY NEWSLETTERS	49.0		48.4	48.3	50.0	48.4	49.2	36.4
MEDIA BUYING	44.8		48.4	55.2	33.3	48.4	43.1	54.5
PHOTOGRAPHY	36.5		12.9	41.4	52.8	12.9	47.7	36.4
RADIO COMMERCIAL PRODUCTION	28.1		22.6	41.4	22.2	22.6	30.8	36.4
DEVELOP SLIDE PRESENTATIONS	27.1		9.7	24.1	44.4	9.7	35.4	45.5
TV COMMERCIAL PRODUCTION	18.8		9.7	24.1	22.2	9.7	23.1	36.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 81A
PERCENTAGE OF COMPANIES WITH IN-HOUSE PRINTING CAPABILITIES

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES WITH AN ADVERTISING DEPARTMENT	96	4	13	14	17	11	14	15	8
COMPANIES WITH IN-HOUSE PRINTING IN THE AD DEPARTMENT	26.0%	-	7.7%	-	47.1%	72.7%	28.6%	13.3%	25.0%
COMPANIES WITH IN-HOUSE PRINTING IN ANOTHER DEPARTMENT	20.8	-	-	21.4	17.6	9.1	28.6	40.0	37.5
COMPANIES WITH IN-HOUSE PRINTING IN BOTH THE AD DEPARTMENT AND ANOTHER DEPARTMENT	3.1	-	-	-	-	-	14.3	-	12.5
COMPANIES WITHOUT IN-HOUSE PRINTING	50.0	100.0	92.3	78.6	35.3	18.2	28.6	46.7	25.0

TABLE 81B
PERCENTAGE OF COMPANIES WITH IN-HOUSE PRINTING CAPABILITIES

	ALL COMPANIES	NUMBER OF STORES OPERATED						
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES WITH AN ADVERTISING DEPARTMENT	96	0	31	29	36	31	65	11
COMPANIES WITH IN-HOUSE PRINTING IN THE AD DEPARTMENT	26.0%		6.5%	44.8%	27.8%	6.5%	35.4%	27.3%
COMPANIES WITH IN-HOUSE PRINTING IN ANOTHER DEPARTMENT	20.8		9.7	17.2	33.3	9.7	26.2	36.4
COMPANIES WITH IN-HOUSE PRINTING IN BOTH THE AD DEPARTMENT AND ANOTHER DEPARTMENT	3.1		-	-	8.3	-	4.6	9.1
COMPANIES WITHOUT IN-HOUSE PRINTING	50.0		83.9	37.9	30.6	83.9	33.8	27.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 82A
TYPES OF IN-HOUSE PRINTING CURRENTLY IN USE

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES WITH IN-HOUSE PRINTING CAPABILITIES	48	0	1	3	11	9	10	8	6
SIGN SHOP	87.5%				90.9%	77.8%	100.0%	75.0%	100.0%
LARGER PRINTERS (SHEET FED)	39.6				18.2	33.3	60.0	50.0	50.0
SMALL PRINTERS	70.8				54.5	88.9	80.0	75.0	83.3
WEB FED PRINTERS	8.3				9.1	-	-	-	50.0

TABLE 82B
TYPES OF IN-HOUSE PRINTING CURRENTLY IN USE

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES WITH IN-HOUSE PRINTING CAPABILITIES	48	0	5	18	25	5	43	8
SIGN SHOP	87.5%		80.0%	83.3%	92.0%	80.0%	88.4%	75.0%
LARGER PRINTERS (SHEET FED)	39.6		20.0	27.8	52.0	20.0	41.9	62.5
SMALL PRINTERS	70.8		40.0	66.7	80.0	40.0	74.4	100.0
WEB FED PRINTERS	8.3		-	5.6	12.0	-	9.3	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 83A
PERCENTAGE OF COMPANIES WITH IN-HOUSE COMPUTER GRAPHICS CAPABILITIES

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES WITH AN ADVERTISING DEPARTMENT	95	4	13	14	17	11	14	14	8
PERCENTAGE WITH IN-HOUSE COMPUTER GRAPHICS	49.5%	25.0%	7.7%	28.6%	58.8%	72.7%	57.1%	57.1%	87.5%

TABLE 83B
PERCENTAGE OF COMPANIES WITH IN-HOUSE COMPUTER GRAPHICS CAPABILITIES

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES WITH AN ADVERTISING DEPARTMENT	95	0	31	29	35	31	64	11
PERCENTAGE WITH IN-HOUSE COMPUTER GRAPHICS	49.5%		29.0%	51.7%	65.7%	29.0%	59.4%	81.8%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 84A
TYPES OF MEDIA USED

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
PERCENTAGE ADVERTISING ON RADIO	53.7%	8.8%	48.9%	72.7%	90.5%	81.8%	100.0%	100.0%	100.0%
PERCENTAGE ADVERTISING ON TELEVISION	41.0	5.9	17.8	54.5	76.2	81.8	100.0	93.3	77.8
PERCENTAGE USING PRE-PRINTED INSERTS	49.8	7.4	48.9	63.6	71.4	81.8	100.0	93.3	100.0
PERCENTAGE USING RUN-OF-PRINT ADS (ROP'S)	50.2	10.3	42.2	63.6	81.0	90.9	100.0	93.3	88.9
PERCENTAGE RETAINING AN AD AGENCY ON A REGULAR BASIS	29.3	1.5	11.1	40.9	52.4	45.5	71.4	86.7	66.7

TABLE 84B
TYPES OF MEDIA USED

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	205	17	31	59	13	30	19	13	23
PERCENTAGE ADVERTISING ON RADIO	53.7%	41.2%	54.8%	47.5%	38.5%	60.0%	68.4%	76.9%	52.2%
PERCENTAGE ADVERTISING ON TELEVISION	41.0	23.5	51.6	37.3	30.8	40.0	57.9	53.8	34.8
PERCENTAGE USING PRE-PRINTED INSERTS	49.8	52.9	51.6	33.9	30.8	53.3	63.2	69.2	69.6
PERCENTAGE USING RUN-OF-PRINT ADS (ROP'S)	50.2	41.2	58.1	42.4	30.8	50.0	57.9	61.5	65.2
PERCENTAGE RETAINING AN AD AGENCY ON A REGULAR BASIS	29.3	41.2	41.9	25.4	30.8	23.3	31.6	15.4	26.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 84C
TYPES OF MEDIA USED

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	205	76	61	32	36	137	68	11
PERCENTAGE ADVERTISING ON RADIO	53.7%	1.3%	73.8%	93.8%	94.4%	33.6%	94.1%	81.8%
PERCENTAGE ADVERTISING ON TELEVISION	41.0	-	37.7	87.5	91.7	16.8	89.7	72.7
PERCENTAGE USING PRE-PRINTED INSERTS	49.8	1.3	65.6	81.3	97.2	29.9	89.7	90.9
PERCENTAGE USING RUN-OF-PRINT ADS (ROP'S)	50.2	3.9	60.7	90.6	94.4	29.2	92.6	81.8
PERCENTAGE RETAINING AN AD AGENCY ON A REGULAR BASIS	29.3	-	27.9	56.3	69.4	12.4	63.2	54.5

TABLE 84D
TYPES OF MEDIA USED

	ALL COMPANIES	COMPANIES WITH AN ADVERTISING DEPARTMENT	COMPANIES WITHOUT AN ADVERTISING DEPARTMENT
TOTAL COMPANIES	205	96	109
PERCENTAGE ADVERTISING ON RADIO	53.7%	90.6%	21.1%
PERCENTAGE ADVERTISING ON TELEVISION	41.0	76.0	10.1
PERCENTAGE USING PRE-PRINTED INSERTS	49.8	81.3	22.0
PERCENTAGE USING RUN-OF-PRINT ADS (ROP'S)	50.2	84.4	20.2
PERCENTAGE RETAINING AN AD AGENCY ON A REGULAR BASIS	29.3	52.1	9.2

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 85

MEDIAN NUMBER OF GROSS RATINGS POINTS EARNED IN A TYPICAL WEEK FOR RADIO ADS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES THAT ADVERTISE ON THE RADIO	150.0	100.0	238.0	50
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10				0
$10 - $30				1
$31 - $100	150.0	60.0	200.0	7
$101 - $250	175.0	100.0	220.0	10
$251 - $500	140.0	115.0	325.0	4
$501 - $1 BILLION	150.0	125.0	200.0	11
$1 BILLION - $3 BILLION	200.0	100.0	300.0	11
OVER $3 BILLION	225.0	150.0	250.0	6
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	150.0	65.0	200.0	4
MID ATLANTIC	200.0	100.0	318.5	8
EAST NORTH CENTRAL	150.0	100.0	200.0	15
WEST NORTH CENTRAL				2
SOUTHEAST	175.0	75.0	300.0	6
WEST SOUTH CENTRAL	200.0	130.0	250.0	7
MOUNTAIN				3
PACIFIC	250.0	100.0	250.0	5
NUMBER OF STORES				
1 STORE				0
2 - 10 STORES	130.0	100.0	250.0	9
11 - 49 STORES	140.0	100.0	200.0	18
50 + STORES	200.0	150.0	250.0	23
INDEPENDENT (1-10 STORES)	130.0	100.0	250.0	9
CHAIN (11+ STORES)	200.0	100.0	220.0	41
WHOLESALE RESPONDENTS	200.0	100.0	220.0	7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 86

MEDIAN NUMBER OF GROSS RATINGS POINTS EARNED IN A TYPICAL WEEK FOR TELEVISION ADS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES THAT ADVERTISE ON TELEVISION	300.0	185.0	350.0	58
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10				2
$10 - $30				2
$31 - $100				3
$101 - $250	200.0	150.0	350.0	11
$251 - $500	250.0	150.0	500.0	7
$501 - $1 BILLION	250.0	160.0	350.0	13
$1 BILLION - $3 BILLION	300.0	200.0	300.0	14
OVER $3 BILLION	350.0	350.0	400.0	6
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	300.0	300.0	300.0	4
MID ATLANTIC	250.0	150.0	400.0	11
EAST NORTH CENTRAL	207.5	137.5	325.0	16
WEST NORTH CENTRAL				2
SOUTHEAST	300.0	235.0	350.0	7
WEST SOUTH CENTRAL	300.0	175.0	437.5	8
MOUNTAIN	225.0	115.0	600.0	4
PACIFIC	325.0	250.0	450.0	6
NUMBER OF STORES				
1 STORE				0
2 - 10 STORES	112.5	80.0	350.0	6
11 - 49 STORES	235.0	150.0	300.0	21
50 + STORES	300.0	250.0	350.0	31
INDEPENDENT (1-10 STORES)	112.5	80.0	350.0	6
CHAIN (11+ STORES)	300.0	200.0	350.0	52
WHOLESALE RESPONDENTS	350.0	250.0	625.0	8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 87

MEDIAN NUMBER OF PRE-PRINTED INSERTS DEVELOPED PER YEAR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES THAT USE PRE-PRINTED INSERTS	51	13	52	93
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10				3
$10 - $30	20	12	51	21
$31 - $100	52	40	52	14
$101 - $250	49	13	52	15
$251 - $500	51	7	104	7
$501 - $1 BILLION	52	24	52	13
$1 BILLION - $3 BILLION	52	23	63	14
OVER $3 BILLION	106	52	215	6
GEOGRAPHIC REGION OF STORES				
NORTHEAST	52	15	52	9
MID ATLANTIC	52	50	53	14
EAST NORTH CENTRAL	48	14	52	18
WEST NORTH CENTRAL	12	9	32	4
SOUTHEAST	40	15	52	13
WEST SOUTH CENTRAL	50	12	52	12
MOUNTAIN	52	51	66	8
PACIFIC	40	12	60	15
NUMBER OF STORES				
1 STORE				1
2 - 10 STORES	34	12	52	38
11 - 49 STORES	50	12	52	26
50 + STORES	52	52	80	28
INDEPENDENT (1-10 STORES)	32	12	52	39
CHAIN (11+ STORES)	52	24	63	54
WHOLESALE RESPONDENTS	109	34	188	8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 88A
PERCENTAGE OF COMPANIES USING THE FOLLOWING TYPES OF INSERTS

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES THAT USE PRE-PRINTED INSERTS	102	5	22	14	15	9	14	14	9
HEAT SET	47.1%	20.0%	9.1%	21.4%	46.7%	55.6%	92.9%	71.4%	77.8%
FOUR-COLOR	74.5	40.0	63.6	78.6	66.7	66.7	92.9	85.7	88.9
BLACK AND WHITE	32.4	40.0	31.8	21.4	33.3	33.3	35.7	14.3	66.7
NEWSPRINT	61.8	20.0	50.0	50.0	66.7	88.9	78.6	50.0	88.9
TWO-COLOR	68.6	60.0	68.2	64.3	80.0	55.6	71.4	64.3	77.8
ROTO GRAVEURE	31.4	60.0	45.5	14.3	40.0	22.2	35.7	14.3	22.2
MARRIAGE MAIL	40.2	-	18.2	50.0	33.3	22.2	64.3	50.0	77.8
OTHER	4.9	20.0	-	-	-	-	21.4	-	11.1

TABLE 88B
PERCENTAGE OF COMPANIES USING THE FOLLOWING TYPES OF INSERTS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES THAT USE PRE-PRINTED INSERTS	102	9	16	20	4	16	12	9	16
HEAT SET	47.1%	33.3%	56.3%	45.0%	75.0%	50.0%	58.3%	33.3%	37.5%
FOUR-COLOR	74.5	66.7	75.0	80.0	75.0	68.8	83.3	77.8	68.8
BLACK AND WHITE	32.4	11.1	56.3	20.0	25.0	18.8	25.0	55.6	43.8
NEWSPRINT	61.8	44.4	62.5	50.0	25.0	62.5	75.0	77.8	75.0
TWO-COLOR	68.6	100.0	87.5	55.0	50.0	62.5	66.7	66.7	62.5
ROTO GRAVEURE	31.4	11.1	50.0	35.0	25.0	12.5	33.3	22.2	43.8
MARRIAGE MAIL	40.2	44.4	37.5	50.0	25.0	18.8	58.3	22.2	50.0
OTHER	4.9	-	-	5.0	-	6.3	8.3	11.1	6.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 88C

PERCENTAGE OF COMPANIES USING THE FOLLOWING TYPES OF INSERTS

	ALL COMPANIES	NUMBER OF STORES OPERATED						WHOLESALE RESPONDENTS
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	
TOTAL COMPANIES THAT USE PRE-PRINTED INSERTS	102	1	40	26	35	41	61	10
HEAT SET	47.1%		12.5%	53.8%	82.9%	12.2%	70.5%	90.0%
FOUR-COLOR	74.5		65.0	69.2	91.4	63.4	82.0	80.0
BLACK AND WHITE	32.4		30.0	23.1	40.0	31.7	32.8	20.0
NEWSPRINT	61.8		47.5	73.1	71.4	46.3	72.1	80.0
TWO-COLOR	68.6		70.0	65.4	71.4	68.3	68.9	100.0
ROTO GRAVEURE	31.4		42.5	26.9	22.9	41.5	24.6	20.0
MARRIAGE MAIL	40.2		22.5	34.6	65.7	22.0	52.5	60.0
OTHER	4.9		2.5	3.8	8.6	2.4	6.6	

TABLE 88D

PERCENTAGE OF COMPANIES USING THE FOLLOWING TYPES OF INSERTS

	ALL COMPANIES	COMPANIES WITH AN ADVERTISING DEPARTMENT	COMPANIES WITHOUT AN ADVERTISING DEPARTMENT
TOTAL COMPANIES THAT USE PRE-PRINTED INSERTS	102	78	24
HEAT SET	47.1%	56.4%	16.7%
FOUR-COLOR	74.5	75.6	70.8
BLACK AND WHITE	32.4	33.3	29.2
NEWSPRINT	61.8	69.2	37.5
TWO-COLOR	68.6	69.2	66.7
ROTO GRAVEURE	31.4	23.1	58.3
MARRIAGE MAIL	40.2	43.6	29.2
OTHER	4.9	6.4	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 69A
MEDIAN NUMBER OF DAYS PER WEEK ON WHICH RUN-OF-PRINT ADS ARE RUN

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES THAT USE RUN-OF-PRINT ADS	1	1	2	91
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1	1	2	7
$10 - $30	2	1	5	16
$31 - $100	2	1	2	10
$101 - $250	1	1	2	16
$251 - $500	1	1	1	9
$501 - $1 BILLION	1	1	2	13
$1 BILLION - $3 BILLION	1	1	2	13
OVER $3 BILLION	2	2	2	7
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	1	1	2	6
MID ATLANTIC	1	1	2	17
EAST NORTH CENTRAL	1	1	1	23
WEST NORTH CENTRAL	1	1	1	4
SOUTHEAST	2	1	2	14
WEST SOUTH CENTRAL	2	2	3	9
MOUNTAIN	3	1	7	6
PACIFIC	2	1	7	12
NUMBER OF STORES				
1 STORE				3
2 - 10 STORES	1	1	2	30
11 - 49 STORES	1	1	2	27
50 + STORES	1	1	2	31
INDEPENDENT (1-10 STORES)	1	1	2	33
CHAIN (11+ STORES)	1	1	2	58
WHOLESALE RESPONDENTS	1	1	1	9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 89B
PERCENTAGE OF COMPANIES RUNNING RUN-OF-PRINT ADS

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
ALL COMPANIES THAT USE RUN-OF-PRINT ADS	91	7	16	10	16	9	13	13	7
1 DAY A WEEK	57.1%	71.4%	50.0%	40.0%	68.8%	77.8%	61.5%	61.5%	14.3%
2 DAYS A WEEK	27.5	14.3	18.8	40.0	18.8	11.1	23.1	38.5	71.4
3 DAYS A WEEK	4.4	-	6.3	-	-	11.1	15.4	-	-
4 DAYS A WEEK	-	-	-	-	-	-	-	-	-
5 DAYS A WEEK	1.1	-	-	-	-	-	-	-	14.3
6 DAYS A WEEK	-	-	-		-	-	-	-	-
7 DAYS A WEEK	9.9	14.3	25.0	20.0	12.5	-	-	-	-

TABLE 89C
PERCENTAGE OF COMPANIES RUNNING RUN-OF-PRINT ADS

	ALL COMPANIES	NUMBER OF STORES OPERATED						WHOLESALE RESPONDENTS
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	
ALL COMPANIES THAT USE RUN-OF-PRINT ADS	91	3	30	27	31	33	58	9
1 DAY A WEEK	57.1%		56.7%	63.0%	51.6%	57.6%	56.9%	77.8%
2 DAYS A WEEK	27.5		20.0	18.5	41.9	21.2	31.0	22.2
3 DAYS A WEEK	4.4		3.3	7.4	3.2	3.0	5.2	-
4 DAYS A WEEK	-		-	-	-	-	-	-
5 DAYS A WEEK	1.1		-	-	3.2	-	1.7	-
6 DAYS A WEEK	-		-	-	-	-	-	-
7 DAYS A WEEK	9.9		20.0	11.1	-	18.2	5.2	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 90A
MEDIAN NUMBER OF PAGES TYPICALLY RUN IN RUN-OF-PRINT ADS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES THAT USE RUN-OF-PRINT ADS	2	1	4	98
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	2	2	4	6
$10 - $30	2	1	4	17
$31 - $100	1	1	3	14
$101 - $250	2	1	4	17
$251 - $500	2	1	2	10
$501 - $1 BILLION	3	1	6	13
$1 BILLION - $3 BILLION	4	1	6	13
OVER $3 BILLION	5	2	8	8
GEOGRAPHIC REGION OF STORES				
NEW ENGLAND	1	1	6	7
MID ATLANTIC	2	1	5	17
EAST NORTH CENTRAL	2	1	4	23
WEST NORTH CENTRAL	2	2	3	4
SOUTHEAST	2	1	3	15
WEST SOUTH CENTRAL	3	2	6	10
MOUNTAIN	1	1	4	8
PACIFIC	4	2	8	14
NUMBER OF STORES				
1 STORE				3
2 - 10 STORES	2	1	4	34
11 - 49 STORES	2	1	4	29
50 + STORES	2	1	6	32
INDEPENDENT (1-10 STORES)	2	1	4	37
CHAIN (11+ STORES)	2	1	5	61
WHOLESALE RESPONDENTS	1	1	2	9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 90B
PERCENTAGE OF COMPANIES USING THE FOLLOWING NUMBER OF PAGES IN RUN-OF-PRINT ADS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
ALL COMPANIES THAT USE RUN-OF-PRINT ADS	98	6	17	14	17	10	13	13	8
1	38.8%	-	35.3%	57.1%	35.3%	50.0%	38.5%	46.2%	25.0%
2	19.4	66.7	17.6	14.3	29.4	40.0	7.7	-	-
3	5.1	-	5.9	7.1	5.9	-	7.7	-	12.5
4	13.3	16.7	17.6	21.4	5.9	-	15.4	23.1	-
5	2.0	-	-	-	-	-	-	-	25.0
6	7.1	-	11.8	-	11.8	10.0	7.7	7.7	-
7	2.0	-	-	-	-	-	-	7.7	12.5
8 OR MORE	12 12.2	1 16.7	2 11.8	0	2 11.8	0	3 23.1	2 15.4	2 25.0

TABLE 90C
PERCENTAGE OF COMPANIES USING THE FOLLOWING NUMBER OF PAGES IN RUN-OF-PRINT ADS

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
ALL COMPANIES THAT USE RUN-OF-PRINT ADS	98	3	34	29	32	37	61	9
1	38.8%		29.4%	44.8%	43.8%	29.7%	44.3%	55.6%
2	19.4		23.5	17.2	12.5	27.0	14.8	33.3
3	5.1		5.9	3.4	6.3	5.4	4.9	-
4	13.3		20.6	13.8	6.3	18.9	9.8	-
5	2.0		-	-	6.3	-	3.3	-
6	7.1		5.9	13.8	3.1	5.4	8.2	-
7	2.0		-	-	6.3	-	3.3	11.1
8 OR MORE	12 12.2		5 14.7	2 6.9	5 15.6	5 13.5	7 11.5	0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 91
TYPES OF MEDIA AND METHODS OF PRODUCTION

	COMPANIES USING THE FOLLOWING TYPES OF MEDIA	PRIMARY METHOD OF PRODUCTION FOR EACH TYPE OF MEDIA		
	TOTAL	IN-HOUSE	AD AGENCY	FREE-LANCE
NEWSPAPERS	60.5%	49.8%	7.8%	4.9%
TELEVISION	41.0	12.2	27.3	3.9
CABLE TV	21.0	6.8	12.7	2.9
BILLBOARDS	27.3	10.7	17.6	.5
RADIO	51.7	23.4	24.9	4.9
MAILER/FLYERS	57.1	42.4	12.7	5.4
MAGAZINES	14.6	10.7	4.9	.5

TABLE 92
USES OF SCANNING DATA FOR ADVERTISING PURPOSES

	PERCENTAGE OF COMPANIES USING SCANNING DATA IN 1989	PERCENTAGE OF COMPANIES PLANNING TO USE SCANNING DATA IN 1990
DISPLAY/AD ANALYSIS	21.5%	23.9%
PLANNING/GOAL SETTING	17.1	20.5
MARKETING BY STORE CLUSTERS	12.7	18.5
FREQUENT SHOPPER PROGRAMS	7.8	14.1
MARKETING BY INDIVIDUAL STORE	16.6	23.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 93
TYPES OF ADVERTSING AND PROMOTIONS

	PERCENTAGE OF COMPANIES USING IN 1989	PERCENTAGE OF COMPANIES PLANNING TO USE IN 1990
FREQUENT SHOPPER PROGRAMS	11.2%	22.9%
ELECTRONIC COUPONS	7.3	15.1
MARKETING BY INDIVIDUAL STORE	25.9	34.6
MARKETING BY STORE CLUSTER	19.5	23.9
DIRECT MAIL	44.4	51.7
OTHER TYPES OF PROMOTIONS	6.3	6.3

TABLE 94A
METHODS USED TO MEASURE THE EFFECTIVENESS OF ADVERTISING

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
SALES	93.7%	89.7%	100.0%	100.0%	81.0%	90.9%	92.9%	100.0%	100.0%
CUSTOMER TRAFFIC	71.2	54.4	80.0	81.8	61.9	72.7	85.7	86.7	100.0
COUPON REDEMPTION	63.4	50.0	75.6	77.3	52.4	63.6	64.3	80.0	66.7
CUSTOMER REACTION	50.2	47.1	42.2	40.9	52.4	63.6	64.3	73.3	55.6
CUSTOMER SURVEYS	42.9	30.9	28.9	45.5	42.9	63.6	64.3	80.0	77.8
MANAGEMENT REACTION	39.5	22.1	35.6	45.5	42.9	81.8	42.9	73.3	55.6
SCANNING/POS DATA	32.7	29.4	28.9	27.3	33.3	36.4	35.7	40.0	66.7
INVENTORY MANAGEMENT	12.2	10.3	11.1	13.6	9.5	-	21.4	26.7	11.1
OTHER METHODS	4.4	1.5	2.2	4.5	9.5	-	21.4	6.7	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 94B
METHODS USED TO MEASURE THE EFFECTIVENESS OF ADVERTISING

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	205	76	61	32	36	137	68	11
SALES	93.7%	90.8%	98.4%	87.5%	97.2%	94.2%	92.6%	90.9%
CUSTOMER TRAFFIC	71.2	59.2	77.0	68.8	88.9	67.2	79.4	81.8
COUPON REDEMPTION	63.4	56.6	65.6	62.5	75.0	60.6	69.1	90.9
CUSTOMER REACTION	50.2	47.4	37.7	65.6	63.9	43.1	64.7	54.5
CUSTOMER SURVEYS	42.9	28.9	37.7	46.9	77.8	32.8	63.2	54.5
MANAGEMENT REACTION	39.5	22.4	36.1	62.5	61.1	28.5	61.8	63.6
SCANNING/POS DATA	32.7	28.9	34.4	31.3	38.9	31.4	35.3	27.3
INVENTORY MANAGEMENT	12.2	9.2	14.8	12.5	13.9	11.7	13.2	9.1
OTHER METHODS	4.4	1.3	4.9	3.1	11.1	2.9	7.4	-

TABLE 94C
METHODS USED TO MEASURE THE EFFECTIVENESS OF ADVERTISING

	ALL COMPANIES	COMPANIES WITH AN ADVERTISING DEPARTMENT	COMPANIES WITHOUT AN ADVERTISING DEPARTMENT
TOTAL COMPANIES	205	96	109
SALES	93.7%	93.8%	93.6%
CUSTOMER TRAFFIC	71.2	79.2	64.2
COUPON REDEMPTION	63.4	69.8	57.8
CUSTOMER REACTION	50.2	62.5	39.4
CUSTOMER SURVEYS	42.9	60.4	27.5
MANAGEMENT REACTION	39.5	58.3	22.9
SCANNING/POS DATA	32.7	37.5	28.4
INVENTORY MANAGEMENT	12.2	14.6	10.1
OTHER METHODS	4.4	8.3	.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 95A
TYPES OF ADS USED IN 1989

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
QUALITY PRODUCE/PRODUCE DEPARTMENT	69.8%	64.7%	66.7%	86.4%	66.7%	72.7%	78.6%	86.7%	44.4%
QUALITY MEATS/MEAT DEPARTMENT	67.8	63.2	62.2	90.9	81.0	72.7	57.1	73.3	44.4
STORE IMAGE	60.5	58.8	57.8	63.6	61.9	63.6	64.3	66.7	55.6
LOW-PRICE/PRICE PROMOTION	54.1	48.5	44.4	63.6	47.6	54.5	64.3	80.0	77.8
PUBLIC SERVICE	42.9	35.3	40.0	50.0	38.1	72.7	50.0	46.7	55.6
GOOD VARIETY/WIDE SELECTION	41.0	13.2	33.3	59.1	66.7	63.6	64.3	73.3	66.7
GOOD SERVICE	39.0	10.3	37.8	68.2	61.9	63.6	42.9	53.3	77.8
NUTRITION/HEALTH	35.1	25.0	26.7	45.5	38.1	45.5	42.9	60.0	55.6
FOOD AND PRODUCT SAFETY	22.9	13.2	15.6	27.3	14.3	36.4	42.9	33.3	77.8
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	15.1	8.8	11.1	13.6	28.6	18.2	21.4	26.7	22.2

TABLE 95B
TYPES OF ADS USED IN 1989

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	205	17	31	59	13	30	19	13	23
QUALITY PRODUCE/PRODUCE DEPARTMENT	69.8%	64.7%	74.2%	74.6%	76.9%	60.0%	63.2%	69.2%	69.6%
QUALITY MEATS/MEAT DEPARTMENT	67.8	64.7	77.4	69.5	84.6	63.3	52.6	69.2	60.9
STORE IM[illegible]	60.5	58.8	51.6	59.3	92.3	53.3	47.4	61.5	78.3
LOW-PRICE/PRICE PROMOTION	54.1	41.2	45.2	55.9	92.3	53.3	57.9	46.2	52.2
PUBLIC SERVICE	42.9	41.2	45.2	37.3	53.8	43.3	42.1	46.2	47.8
GOOD VARIETY/WIDE SELECTION	41.0	41.2	41.9	37.3	30.8	46.7	47.4	38.5	43.5
GOOD SERVICE	39.0	47.1	32.3	40.7	30.8	36.7	26.3	53.8	47.8
NUTRITION/HEALTH	35.1	41.2	29.0	40.7	46.2	23.3	21.1	30.8	47.8
FOOD AND PRODUCT SAFETY	22.9	35.3	19.4	18.6	7.7	23.3	26.3	7.7	43.5
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	15.1	29.4	22.6	13.6	7.7	3.3	5.3	15.4	26.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 95C
TYPES OF ADS USED IN 1989

	ALL COMPANIES	NUMBER OF STORES OPERATED						WHOLESALE RESPONDENTS
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	
TOTAL COMPANIES	205	76	61	32	36	137	68	11
QUALITY PRODUCE/PRODUCE DEPARTMENT	69.8%	67.1%	63.9%	78.1%	77.8%	65.7%	77.9%	90.9%
QUALITY MEATS/MEAT DEPARTMENT	67.8	63.2	68.9	81.3	63.9	65.7	72.1	90.9
STORE IMAGE	60.5	57.9	57.4	71.9	61.1	57.7	66.2	54.5
LOW-PRICE/PRICE PROMOTION	54.1	47.4	50.8	65.6	63.9	48.9	64.7	72.7
PUBLIC SERVICE	42.9	38.2	37.7	53.1	52.8	38.0	52.9	45.5
GOOD VARIETY/WIDE SELECTION	41.0	3.9	54.1	75.0	66.7	26.3	70.6	63.6
GOOD SERVICE	39.0	2.6	60.7	62.5	58.3	28.5	60.3	72.7
NUTRITION/HEALTH	35.1	25.0	36.1	40.6	50.0	29.9	45.6	27.3
FOOD AND PRODUCT SAFETY	22.9	14.5	14.8	25.0	52.8	14.6	39.7	27.3
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	15.1	10.5	9.8	21.9	27.8	10.2	25.0	27.3

TABLE 96A
TYPES OF CAMPAIGNS USED IN 1989

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
STORE IMAGE	35.1%	25.0%	24.4%	50.0%	19.0%	54.5%	64.3%	60.0%	55.6%
QUALITY PRODUCE/PRODUCE DEPARTMENT	34.6	19.1	35.6	36.4	28.6	45.5	50.0	66.7	66.7
QUALITY MEATS/MEAT DEPARTMENT	33.7	20.6	33.3	36.4	23.8	45.5	64.3	46.7	66.7
LOW-PRICE/PRICE PROMOTION	28.3	13.2	20.0	27.3	38.1	54.5	42.9	66.7	44.4
GOOD SERVICE	24.9	2.9	24.4	31.8	33.3	36.4	57.1	46.7	55.6
GOOD VARIETY/WIDE SELECTION	22.0	5.9	20.0	27.3	23.8	27.3	57.1	46.7	33.3
PUBLIC SERVICE	20.0	14.7	22.2	22.7	9.5	27.3	42.9	26.7	11.1
NUTRITION/HEALTH	19.0	10.3	17.8	27.3	19.0	36.4	21.4	33.3	22.2
FOOD AND PRODUCT SAFETY	7.8	1.5	11.1	9.1	4.8	18.2	21.4	13.3	- -
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	7.8	4.4	8.9	9.1	4.8	-	14.3	26.7	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 96B
TYPES OF CAMPAIGNS USED IN 1989

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	205	17	31	59	13	30	19	13	23
STORE IMAGE	35.1%	41.2%	38.7%	23.7%	53.8%	33.3%	57.9%	38.5%	26.1%
QUALITY PRODUCE/PRODUCE DEPARTMENT	34.6	47.1	35.5	27.1	23.1	33.3	52.6	30.8	39.1
QUALITY MEATS/MEAT DEPARTMENT	33.7	29.4	38.7	27.1	23.1	36.7	57.9	30.8	30.4
LOW-PRICE/PRICE PROMOTION	28.3	35.3	35.5	22.0	38.5	30.0	36.8	15.4	21.7
GOOD SERVICE	24.9	29.4	35.5	10.2	23.1	26.7	42.1	30.8	26.1
GOOD VARIETY/WIDE SELECTION	22.0	23.5	22.6	11.9	23.1	36.7	31.6	23.1	17.4
PUBLIC SERVICE	20.0	29.4	29.0	18.6	15.4	13.3	31.6	23.1	4.3
NUTRITION/HEALTH	19.0	29.4	29.0	20.3	7.7	10.0	26.3	23.1	4.3
FOOD AND PRODUCT SAFETY	7.8	17.6	6.5	5.1	7.7	6.7	10.5	7.7	8.7
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	7.8	29.4	16.1	3.4	7.7	6.7	5.3	-	-

TABLE 96C
TYPES OF CAMPAIGNS USED IN 1989

	ALL COMPANIES	NUMBER OF STORES OPERATED						WHOLESALE RESPONDENTS
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	
TOTAL COMPANIES	205	76	61	32	36	137	68	11
STORE IMAGE	35.1%	25.0%	29.5%	43.8%	58.3%	27.0%	51.5%	54.5%
QUALITY PRODUCE/PRODUCE DEPARTMENT	34.6	21.1	34.4	40.6	58.3	27.0	50.0	18.2
QUALITY MEATS/MEAT DEPARTMENT	33.7	22.4	32.8	40.6	52.8	27.0	47.1	18.2
LOW-PRICE/PRICE PROMOTION	28.3	11.8	23.0	43.8	58.3	16.8	51.5	63.6
GOOD SERVICE	24.9	2.6	32.8	25.0	58.3	16.1	42.6	54.5
GOOD VARIETY/WIDE SELECTION	22.0	3.9	23.0	34.4	47.2	12.4	41.2	45.5
PUBLIC SERVICE	20.0	15.8	16.4	15.6	38.9	16.1	27.9	27.3
NUTRITION/HEALTH	19.0	11.8	18.0	21.9	33.3	14.6	27.9	18.2
FOOD AND PRODUCT SAFETY	7.8	1.3	9.8	9.4	16.7	5.1	13.2	-
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	7.8	5.3	8.2	6.3	13.9	6.6	10.3	9.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 97A
TYPES OF ADS PLANNED FOR 1990

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
QUALITY PRODUCE/PRODUCE DEPARTMENT	60.0%	52.9%	64.4%	72.7%	42.9%	72.7%	71.4%	80.0%	33.3%
QUALITY MEATS/MEAT DEPARTMENT	59.5	52.9	66.7	68.2	57.1	63.6	57.1	73.3	33.3
STORE IMAGE	52.2	51.5	48.9	63.6	33.3	54.5	64.3	73.3	33.3
LOW-PRICE/PRICE PROMOTION	50.7	42.6	44.4	63.6	42.9	54.5	57.1	80.0	66.7
GOOD VARIETY/WIDE SELECTION	40.0	13.2	37.8	59.1	52.4	63.6	57.1	80.0	55.6
PUBLIC SERVICE	38.5	26.5	37.8	45.5	33.3	63.6	50.0	53.3	55.6
GOOD SERVICE	36.1	8.8	40.0	59.1	47.6	63.6	42.9	60.0	55.6
NUTRITION/HEALTH	35.6	23.5	37.8	40.9	28.6	36.4	64.3	60.0	33.3
FOOD AND PRODUCT SAFETY	23.9	17.6	22.2	22.7	9.5	27.3	42.9	46.7	44.4
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	22.4	11.8	17.8	27.3	28.6	18.2	28.6	60.0	33.3

TABLE 97B
TYPES OF ADS PLANNED FOR 1990

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	205	17	31	59	13	30	19	13	23
QUALITY PRODUCE/PRODUCE DEPARTMENT	60.0%	58.8%	67.7%	64.4%	46.2%	53.3%	63.2%	53.8%	56.5%
QUALITY MEATS/MEAT DEPARTMENT	59.5	52.9	67.7	66.1	69.2	50.0	52.6	53.8	52.2
STORE IMAGE	52.2	52.9	51.6	55.9	53.8	43.3	42.1	46.2	65.2
LOW-PRICE/PRICE PROMOTION	50.7	35.3	48.4	57.6	69.2	53.3	47.4	38.5	43.5
GOOD VARIETY/WIDE SELECTION	40.0	35.3	45.2	39.0	38.5	43.3	36.8	38.5	39.1
PUBLIC SERVICE	38.5	41.2	41.9	39.0	38.5	36.7	42.1	30.8	34.8
GOOD SERVICE	36.1	41.2	35.5	35.6	30.8	33.3	26.3	46.2	43.5
NUTRITION/HEALTH	35.6	41.2	32.3	42.4	30.8	23.3	31.6	30.8	43.5
FOOD AND PRODUCT SAFETY	23.9	41.2	25.8	18.6	7.7	16.7	31.6	7.7	43.5
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	22.4	35.3	32.3	23.7	15.4	10.0	15.8	15.4	26.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 97C
TYPES OF ADS PLANNED FOR 1990

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	205	76	61	32	36	137	68	11
QUALITY PRODUCE/PRODUCE DEPARTMENT	60.0%	52.6%	62.3%	62.5%	69.4%	56.9%	66.2%	90.9%
QUALITY MEATS/MEAT DEPARTMENT	59.5	53.9	65.6	56.3	63.9	59.1	60.3	90.9
STORE IMAGE	52.2	50.0	49.2	56.3	58.3	49.6	57.4	54.5
LOW-PRICE/PRICE PROMOTION	50.7	42.1	49.2	62.5	61.1	45.3	61.8	72.7
GOOD VARIETY/WIDE SELECTION	40.0	6.6	50.8	68.8	66.7	26.3	67.6	63.6
PUBLIC SERVICE	38.5	30.3	32.8	50.0	55.6	31.4	52.9	45.5
GOOD SERVICE	36.1	2.6	54.1	59.4	55.6	25.5	57.4	72.7
NUTRITION/HEALTH	35.6	23.7	42.6	37.5	47.2	32.1	42.6	36.4
FOOD AND PRODUCT SAFETY	23.9	17.1	18.0	25.0	47.2	17.5	36.8	18.2
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	22.4	13.2	19.7	25.0	44.4	16.1	35.3	27.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 98A
TYPES OF CAMPAIGNS PLANNED FOR 1990

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	205	68	45	22	21	11	14	15	9
QUALITY MEATS/MEAT DEPARTMENT	33.7%	22.1%	22.2%	40.9%	23.8%	45.5%	57.1%	73.3%	66.7%
STORE IMAGE	33.7	23.5	22.2	45.5	19.0	54.5	64.3	60.0	55.6
QUALITY PRODUCE/PRODUCE DEPARTMENT	32.7	23.5	26.7	36.4	14.3	45.5	42.9	73.3	66.7
GOOD SERVICE	24.9	4.4	24.4	27.3	23.8	45.5	50.0	60.0	55.6
LOW-PRICE/PRICE PROMOTION	23.9	13.2	13.3	27.3	28.6	54.5	21.4	60.0	44.4
NUTRITION/HEALTH	21.0	11.8	20.0	27.3	14.3	45.5	28.6	40.0	22.2
GOOD VARIETY/WIDE SELECTION	19.5	4.4	17.8	22.7	19.0	27.3	35.7	60.0	33.3
PUBLIC SERVICE	16.6	13.2	15.6	22.7	4.8	36.4	35.7	20.0	-
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	10.2	2.9	11.1	9.1	9.5	9.1	21.4	40.0	-
FOOD AND PRODUCT SAFETY	9.3	1.5	13.3	9.1	4.8	18.2	21.4	26.7	-

TABLE 98B
TYPES OF CAMPAIGNS PLANNED FOR 1990

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	205	17	31	59	13	30	19	13	23
QUALITY MEATS/MEAT DEPARTMENT	33.7%	35.3%	32.3%	30.5%	30.8%	30.0%	52.6%	38.5%	30.4%
STORE IMAGE	33.7	41.2	35.5	22.0	38.5	40.0	57.9	30.8	26.1
QUALITY PRODUCE/PRODUCE DEPARTMENT	32.7	35.3	35.5	27.1	15.4	36.7	42.1	38.5	34.8
GOOD SERVICE	24.9	29.4	32.3	13.6	23.1	30.0	36.8	30.8	21.7
LOW-PRICE/PRICE PROMOTION	23.9	23.5	29.0	20.3	23.1	26.7	26.3	23.1	21.7
NUTRITION/HEALTH	21.0	29.4	29.0	27.1	7.7	10.0	26.3	23.1	4.3
GOOD VARIETY/WIDE SELECTION	19.5	23.5	19.4	11.9	23.1	30.0	21.1	23.1	17.4
PUBLIC SERVICE	16.6	23.5	19.4	18.6	7.7	13.3	21.1	23.1	4.3
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	10.2	23.5	16.1	11.9	7.7	3.3	5.3	7.7	4.3
FOOD AND PRODUCT SAFETY	9.3	23.5	12.9	6.8	-	10.0	15.8	-	4.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 98C
TYPES OF CAMPAIGNS PLANNED FOR 1990

		NUMBER OF STORES OPERATED						
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)	WHOLESALE RESPONDENTS
TOTAL COMPANIES	205	76	61	32	36	137	68	11
QUALITY MEATS/MEAT DEPARTMENT	33.7%	19.7%	31.1%	34.4%	66.7%	24.8%	51.5%	27.3%
STORE IMAGE	33.7	19.7	29.5	46.9	58.3	24.1	52.9	54.5
QUALITY PRODUCE/PRODUCE DEPARTMENT	32.7	18.4	31.1	37.5	61.1	24.1	50.0	27.3
GOOD SERVICE	24.9	2.6	26.2	34.4	61.1	13.1	48.5	54.5
LOW-PRICE/PRICE PROMOTION	23.9	9.2	21.3	37.5	47.2	14.6	42.6	63.6
NUTRITION/HEALTH	21.0	11.8	21.3	21.9	38.9	16.1	30.9	27.3
GOOD VARIETY/WIDE SELECTION	19.5	2.6	19.7	31.3	44.4	10.2	38.2	45.5
PUBLIC SERVICE	16.6	11.8	13.1	18.8	30.6	12.4	25.0	27.3
ENVIRONMENTALLY SAFE PRODUCTS, PACKAGING, ETC.	10.2	5.3	8.2	12.5	22.2	6.6	17.6	9.1
FOOD AND PRODUCT SAFETY	9.3	1.3	8.2	18.8	19.4	4.4	19.1	9.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 99A
PROFILE OF RESPONDENTS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL	223	17	31	54	18	43	15	13	32
1 STORE OPERATORS	34.1%	35.3%	16.1%	46.3%	50.0%	27.9%	13.3%	23.1%	43.8%
2 - 10 STORE COMPANIES	35.9	35.3	29.0	33.3	16.7	44.2	53.3	46.2	34.4
11 - 49 STORE COMPANIES	9.9	11.8	22.6	3.7	16.7	4.7	20.0	7.7	6.3
50 + STORE COMPANIES	15.2	11.8	19.4	11.1	16.7	18.6	13.3	23.1	12.5
INDEPENDENTS (1 - 10 STORES)	70.0	70.6	45.2	79.6	66.7	72.1	66.7	69.2	78.1
CHAINS (11 + STORES)	25.1	23.5	41.9	14.8	33.3	23.3	33.3	30.8	18.8
WHOLESALERS	7.2	11.8	19.4	7.4	5.6	4.7	6.7	-	-
RETAILERS	92.8	88.2	80.6	92.6	94.4	95.3	93.3	100.0	100.0

TABLE 99B
PROFILE OF WHOLESALE PARTICIPANTS

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	16	16	0	0	3	3	3
COOPERATIVE WHOLESALER	37.5%	37.5%					
VOLUNTARY WHOLESALER	50.0	50.0					
UNAFFILIATED WHOLESALER	12.5	12.5					

TABLE 99C
PROFILE OF WHOLESALE PARTICIPANTS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	16	2	6	4	1	2	1	0	0
COOPERATIVE WHOLESALER	37.5%		33.3%	50.0%					
VOLUNTARY WHOLESALER	50.0		33.3	50.0					
UNAFFILIATED WHOLESALER	12.5		33.3	-					

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 100A

MOST IMPORTANT ISSUES FACING FOOD DISTRIBUTORS

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	223	16	207	76	80	22	34
MOST IMPORTANT ISSUE							
HEALTH-CARE COSTS	51.6%	62.5%	50.7%	60.5%	48.8%	40.9%	41.2%
LABOR SHORTAGE	35.9	31.3	36.2	27.6	35.0	50.0	50.0
SOLID WASTE	4.0	-	4.3	6.6	-	9.1	2.9
SUBSTANCE ABUSE PROBLEMS	2.7	6.3	2.4	-	6.3	-	2.9
FOOD SAFETY	2.2	-	2.4	1.3	3.8	-	2.9
OTHER	2.2	-	2.4	2.6	3.8	-	-
SECOND MOST IMPORTANT ISSUE							
HEALTH-CARE COSTS	36.8	37.5	36.7	28.9	35.0	54.5	50.0
LABOR SHORTAGE	29.6	25.0	30.0	34.2	30.0	31.8	17.6
SOLID WASTE	13.0	18.8	12.6	17.1	12.5	-	8.8
SUBSTANCE ABUSE PROBLEMS	12.1	18.8	11.6	9.2	11.3	9.1	20.6
FOOD SAFETY	4.5	-	4.8	5.3	6.3	-	2.9
OTHER	.9	-	1.0	1.3	1.3	-	-
THIRD MOST IMPORTANT ISSUE							
SUBSTANCE ABUSE PROBLEMS	29.1	43.8	28.0	25.0	23.8	36.4	41.2
SOLID WASTE	21.1	18.8	21.3	30.3	20.0	22.7	8.8
FOOD SAFETY	19.7	12.5	20.3	15.8	18.8	31.8	23.5
LABOR SHORTAGE	16.6	25.0	15.9	18.4	16.3	4.5	17.6
HEALTH-CARE COSTS	6.3	-	6.8	5.3	8.8	4.5	2.9
OTHER	.4	-	.5	-	1.3	-	-
FOURTH MOST IMPORTANT ISSUE							
FOOD SAFETY	33.2	31.3	33.3	32.9	27.5	54.5	29.4
SOLID WASTE	27.4	37.5	26.6	27.6	28.7	13.6	35.3
SUBSTANCE ABUSE PROBLEMS	22.0	25.0	21.7	22.4	20.0	27.3	17.6
LABOR SHORTAGE	6.3	6.3	6.3	5.3	7.5	9.1	5.9
HEALTH-CARE COSTS	2.2	-	2.4	1.3	3.8	-	[illegible]
OTHER	1.3	-	1.4	3.9	-	-	-

Continued

TABLE 100A

MOST IMPORTANT ISSUES FACING FOOD DISTRIBUTORS

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
FIFTH MOST IMPORTANT ISSUE							
FOOD SAFETY	31.8	56.3	30.0	36.8	30.0	13.6	35.3
SOLID WASTE	27.8	25.0	28.0	13.2	27.5	54.5	38.2
SUBSTANCE ABUSE PROBLEMS	23.8	6.3	25.1	32.9	23.8	27.3	8.8
LABOR SHORTAGE	7.2	12.5	6.8	7.9	5.0	4.5	8.8
HEALTH-CARE COSTS	1.3	-	1.4	1.3	1.3	-	2.9
OTHER	.4	-	.5	1.3	-	-	-
SIXTH MOST IMPORTANT ISSUE							
SUBSTANCE ABUSE PROBLEMS	1.8	-	1.9	2.6	2.5	-	-
OTHER	1.3	-	1.4	1.3	1.3	-	2.9
LABOR SHORTAGE	-	-	-	-	-	-	-
HEALTH-CARE COSTS	-	-	-	-	-	-	-
SOLID WASTE	-	-	-	-	-	-	-
FOOD SAFETY	-	-	-	-	-	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 100B

MOST IMPORTANT ISSUES FACING FOOD DISTRIBUTORS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
MOST IMPORTANT ISSUE									
HEALTH-CARE COSTS	51.6%	47.1%	45.2%	48.1%	44.4%	51.2%	66.7%	61.5%	59.4%
LABOR SHORTAGE	35.9	29.4	48.4	38.9	38.9	39.5	20.0	23.1	28.1
SOLID WASTE	4.0	5.9	-	7.4	11.1	2.3	-	-	3.1
SUBSTANCE ABUSE PROBLEMS	2.7	11.8	-	-	-	2.3	-	15.4	3.1
FOOD SAFETY	2.2	-	-	3.7	-	2.3	-	-	6.3
OTHER	2.2	5.9	3.2	1.9	5.6	-	6.7	-	-
SECOND MOST IMPORTANT ISSUE									
HEALTH-CARE COSTS	36.8	41.2	38.7	42.6	38.9	41.9	20.0	23.1	28.1
LABOR SHORTAGE	29.6	17.6	25.8	27.8	44.4	32.6	26.7	53.8	21.9
SOLID WASTE	13.0	35.3	12.9	18.5	11.1	9.3	-	7.7	6.3
SUBSTANCE ABUSE PROBLEMS	12.1	-	12.9	3.7	5.6	9.3	40.0	15.4	25.0
FOOD SAFETY	4.5	5.9	3.2	3.7	-	-	6.7	-	15.6
OTHER	.9	-	-	1.9	-	2.3	-	-	-
THIRD MOST IMPORTANT ISSUE									
SUBSTANCE ABUSE PROBLEMS	29.1	11.8	22.6	29.6	44.4	39.5	13.3	23.1	31.3
SOLID WASTE	21.1	17.6	22.6	22.2	27.8	11.6	33.3	23.1	21.9
FOOD SAFETY	19.7	17.6	16.1	18.5	11.1	23.3	33.3	30.8	15.6
LABOR SHORTAGE	16.6	29.4	12.9	22.2	5.6	14.0	13.3	15.4	15.6
HEALTH-CARE COSTS	6.3	11.8	12.9	3.7	11.1	-	-	7.7	9.4
OTHER	.4	-	-	-	-	2.3	-	-	-
FOURTH MOST IMPORTANT ISSUE									
FOOD SAFETY	33.2	23.5	32.3	31.5	66.7	27.9	26.7	46.2	28.1
SOLID WASTE	27.4	17.6	32.3	24.1	22.2	34.9	40.0	15.4	25.0
SUBSTANCE ABUSE PROBLEMS	22.0	47.1	16.1	27.8	11.1	14.0	13.3	23.1	25.0
LABOR SHORTAGE	6.3	5.9	3.2	3.7	-	4.7	13.3	-	18.8
HEALTH-CARE COSTS	2.2	-	-	3.7	-	4.7	-	7.7	-
OTHER	1.3	-	-	3.7	-	-	-	-	3.1

Continued

TABLE 100B
MOST IMPORTANT ISSUES FACING FOOD DISTRIBUTORS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
FIFTH MOST IMPORTANT ISSUE									
FOOD SAFETY	31.8	52.9	32.3	35.2	22.2	32.6	20.0	15.4	31.3
SOLID WASTE	27.8	17.6	19.4	24.1	27.8	30.2	20.0	46.2	40.6
SUBSTANCE ABUSE PROBLEMS	23.8	17.6	29.0	29.6	33.3	18.6	26.7	23.1	12.5
LABOR SHORTAGE	7.2	5.9	3.2	5.6	11.1	4.7	20.0	7.7	9.4
HEALTH-CARE COSTS	1.3	-	-	-	5.6	-	6.7	-	3.1
OTHER	.4	5.9	-	-	-	-	-	-	-
SIXTH MOST IMPORTANT ISSUE									
SUBSTANCE ABUSE PROBLEMS	1.8	5.9	-	1.9	5.6	2.3	-	-	-
OTHER	1.3	-	-	-	11.1	-	-	7.7	-
LABOR SHORTAGE	-	-	-	-	-	-	-	-	-
HEALTH-CARE COSTS	-	-	-	-	-	-	-	-	-
SOLID WASTE	-	-	-	-	-	-	-	-	-
FOOD SAFETY	-	-	-	-	-	-	-	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 101A

MOST SERIOUS PROBLEMS WITH THE CURRENT HEALTH-CARE SYSTEM

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	223	16	207	76	80	22	34
MOST SERIOUS PROBLEM							
HIGH COST	84.8%	81.3%	85.0%	90.8%	85.0%	72.7%	73.5%
OVER UTILIZATION OF MEDICAL SERVICES	9.0	-	9.7	5.3	5.0	18.2	23.5
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	3.6	18.8	2.4	2.6	3.8	9.1	2.9
QUALITY OF MEDICAL CARE	-	-	-	-	-	-	-
OTHER	-	-	-	-	-	-	-
SECOND MOST SERIOUS PROBLEM							
OVER UTILIZATION OF MEDICAL SERVICES	46.2	62.5	44.9	38.2	45.0	50.0	61.8
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	26.9	6.3	28.5	35.5	26.3	18.2	11.8
HIGH COST	11.2	18.8	10.6	7.9	8.8	18.2	23.5
QUALITY OF MEDICAL CARE	8.5	6.3	8.7	11.8	8.8	9.1	-
OTHER	2.7	6.3	2.4	3.9	1.3	4.5	2.9
THIRD MOST SERIOUS PROBLEM							
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	30.0	31.3	30.0	25.0	31.3	40.9	38.2
QUALITY OF MEDICAL CARE	26.5	31.3	26.1	23.7	22.5	22.7	32.4
OVER UTILIZATION OF MEDICAL SERVICES	24.7	31.3	24.2	32.9	22.5	27.3	11.8
HIGH COST	1.3	-	1.4	-	1.3	4.5	2.9
OTHER	1.3	-	1.4	1.3	1.3	-	2.9
FOURTH MOST SERIOUS PROBLEM							
QUALITY OF MEDICAL CARE	46.6	50.0	46.4	46.1	47.5	63.6	44.1
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	24.2	31.3	23.7	19.7	20.0	22.7	35.3
OVER UTILIZATION OF MEDICAL SERVICES	11.7	6.3	12.1	15.8	12.5	4.5	2.9
OTHER	.9	6.3	.5	-	-	-	5.9
HIGH COST	.4	-	.5	-	-	4.5	-

Continued

TABLE 101A

MOST SERIOUS PROBLEMS WITH THE CURRENT HEALTH-CARE SYSTEM

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
FIFTH MOST SERIOUS PROBLEM							
QUALITY OF MEDICAL CARE	2.7	6.3	2.4	1.3	1.3	-	11.8
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	1.3	6.3	1.0	1.3	1.3	4.5	-
OTHER	.9	-	1.0	-	1.3	-	2.9
HIGH COST	-	-	-	-	-	-	-
OVER UTILIZATION OF MEDICAL SERVICES	-	-	-	-	-	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 101B

MOST SERIOUS PROBLEMS WITH THE CURRENT HEALTH-CARE SYSTEM

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
MOST SERIOUS PROBLEM									
HIGH COST	84.8%	82.4%	83.9%	92.6%	77.8%	93.0%	60.0%	76.9%	81.3%
OVER UTILIZATION OF MEDICAL SERVICES	9.0	11.8	9.7	3.7	22.2	7.0	6.7	7.7	12.5
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	3.6	5.9	3.2	1.9	-	-	20.0	7.7	3.1
QUALITY OF MEDICAL CARE	-	-	-	-	-	-	-	-	-
OTHER	-	-	-	-	-	-	-	-	-
SECOND MOST SERIOUS PROBLEM									
OVER UTILIZATION OF MEDICAL SERVICES	46.2	52.9	38.7	37.0	55.6	58.1	40.0	53.8	43.8
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	26.9	17.6	29.0	38.9	22.2	18.6	20.0	15.4	31.3
HIGH COST	11.2	17.6	12.9	5.6	16.7	7.0	26.7	15.4	9.4
QUALITY OF MEDICAL CARE	8.5	5.9	9.7	9.3	5.6	9.3	13.3	-	9.4
OTHER	2.7	5.9	3.2	5.6	-	2.3	-	-	-
THIRD MOST SERIOUS PROBLEM									
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	30.0	23.5	12.9	29.6	61.1	30.2	40.0	38.5	25.0
QUALITY OF MEDICAL CARE	26.5	23.5	41.9	22.2	16.7	27.9	20.0	15.4	31.3
OVER UTILIZATION OF MEDICAL SERVICES	24.7	23.5	25.8	35.2	16.7	16.3	20.0	23.1	25.0
HIGH COST	1.3	-	-	-	-	-	6.7	-	6.3
OTHER	1.3	5.9	-	1.9	-	2.3	-	-	-
FOURTH MOST SERIOUS PROBLEM									
QUALITY OF MEDICAL CARE	46.6	47.1	29.0	51.9	72.2	37.2	46.7	61.5	46.9
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	24.2	29.4	35.5	16.7	16.7	32.6	6.7	15.4	28.1
OVER UTILIZATION OF MEDICAL SERVICES	11.7	5.9	12.9	18.5	-	7.0	26.7	-	12.5
OTHER	.9	-	3.2	-	-	-	6.7	-	-
HIGH COST	.4	-	-	-	5.6	-	-	-	-

Continued

TABLE 101B

MOST SERIOUS PROBLEMS WITH THE CURRENT HEALTH-CARE SYSTEM

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
FIFTH MOST SERIOUS PROBLEM									
QUALITY OF MEDICAL CARE	2.7	5.9	3.2	3.7	-	2.3	6.7	-	-
GAPS IN COVERAGE (UNCOMPENSATED CARE FOR UNINSURED)	1.3	5.9	3.2	1.9	-	-	-	-	-
OTHER	.9	-	-	-	-	2.3	-	-	3.1
HIGH COST	-	-	-	-	-	-	-	-	-
OVER UTILIZATION OF MEDICAL SERVICES	-	-	-	-	-	-	-	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 102A

MOST EFFECTIVE WAY TO CONTROL EMPLOYER-PROVIDED HEALTH-CARE COSTS

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	223	16	207	76	80	22	34
MOST EFFECTIVE WAY							
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	28.3%	56.3%	26.1%	11.8%	31.3%	31.8%	52.9%
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	22.9	12.5	23.7	27.6	21.3	18.2	17.6
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	22.0	18.8	22.2	27.6	18.8	18.2	20.6
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	17.9	12.5	18.4	27.6	12.5	18.2	8.8
CAP HEALTH-CARE PROVIDER COMPENSATION	7.6	-	8.2	3.9	13.8	13.6	-
SECOND MOST EFFECTIVE WAY							
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	27.8	37.5	27.1	13.2	37.5	27.3	38.2
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	26.5	12.5	27.5	27.6	21.3	31.8	26.5
CAP HEALTH-CARE PROVIDER COMPENSATION	17.5	25.0	16.9	26.3	12.5	18.2	8.8
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	16.6	18.8	16.4	18.4	15.0	18.2	20.6
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	7.2	6.3	7.2	7.9	7.5	4.5	5.9

Continued

TABLE 102A

MOST EFFECTIVE WAY TO CONTROL EMPLOYER-PROVIDED HEALTH-CARE COSTS

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
THIRD MOST EFFECTIVE WAY							
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	23.3	43.8	21.7	18.4	16.3	36.4	35.3
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	22.4	18.8	22.7	27.6	23.8	18.2	11.8
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	19.7	6.3	20.8	17.1	20.0	36.4	20.6
CAP HEALTH-CARE PROVIDER COMPENSATION	19.3	18.8	19.3	17.1	20.0	9.1	23.5
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	7.2	12.5	6.8	10.5	8.8	-	2.9
FOURTH MOST EFFECTIVE WAY							
CAP HEALTH-CARE PROVIDER COMPENSATION	26.5	31.3	26.1	17.1	21.3	36.4	52.9
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	18.8	12.5	19.3	17.1	26.3	9.1	14.7
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	16.1	18.8	15.9	22.4	10.0	9.1	11.8
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	13.5	25.0	12.6	14.5	10.0	27.3	8.8
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	13.0	12.5	13.0	15.8	13.8	18.2	5.9
FIFTH MOST EFFECTIVE WAY							
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	44.8	43.8	44.9	30.3	46.3	50.0	67.6
CAP HEALTH-CARE PROVIDER COMPENSATION	18.8	25.0	18.4	23.7	17.5	22.7	8.8
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	10.8	12.5	10.6	10.5	8.8	18.2	8.8
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	9.4	18.8	8.7	14.5	5.0	9.1	8.8
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	4.5	-	4.8	9.2	3.8	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 102B

MOST EFFECTIVE WAY TO CONTROL EMPLOYER-PROVIDED HEALTH-CARE COSTS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
MOST EFFECTIVE WAY									
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	28.3	41.2	29.0	20.4	22.2	23.3	53.3	46.2	25.0
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	22.9	17.6	22.6	20.4	27.8	34.9	6.7	30.8	15.6
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	22.0	17.6	16.1	27.8	22.2	23.3	20.0	-	28.1
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	17.9	23.5	25.8	20.4	16.7	9.3	13.3	7.7	21.9
CAP HEALTH-CARE PROVIDER COMPENSATION	7.6	-	6.5	7.4	11.1	9.3	-	15.4	9.4
SECOND MOST EFFECTIVE WAY									
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	27.8	41.2	32.3	24.1	16.7	27.9	20.0	38.5	28.1
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	26.5	23.5	19.4	29.6	11.1	34.9	26.7	23.1	28.1
CAP HEALTH-CARE PROVIDER COMPENSATION	17.5	5.9	25.8	18.5	38.9	14.0	13.3	15.4	9.4
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	16.6	23.5	16.1	16.7	27.8	11.6	13.3	15.4	15.6
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	7.2	5.9	3.2	9.3	5.6	-	13.3	-	18.8

Continued

TABLE 102B

MOST EFFECTIVE WAY TO CONTROL EMPLOYER-PROVIDED HEALTH-CARE COSTS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
THIRD MOST EFFECTIVE WAY									
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	23.3	11.8	35.5	18.5	16.7	18.6	26.7	23.1	34.4
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	22.4	17.6	22.6	24.1	38.9	20.9	6.7	15.4	25.0
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	19.7	23.5	19.4	16.7	16.7	20.9	33.3	30.8	12.5
CAP HEALTH-CARE PROVIDER COMPENSATION	19.3	23.5	9.7	22.2	16.7	20.9	20.0	23.1	18.8
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	7.2	17.6	6.5	9.3	11.1	4.7	-	-	6.3
FOURTH MOST EFFECTIVE WAY									
CAP HEALTH-CARE PROVIDER COMPENSATION	26.5	41.2	25.8	24.1	22.2	18.6	46.7	30.8	25.0
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	18.8	35.3	3.2	25.9	11.1	16.3	26.7	7.7	21.9
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	16.1	5.9	19.4	13.0	16.7	18.6	13.3	23.1	18.8
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	13.5	5.9	16.1	13.0	22.2	14.0	-	23.1	12.5
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	13.0	5.9	22.6	13.0	27.8	7.0	-	7.7	15.6
FIFTH MOST EFFECTIVE WAY									
INTRODUCE NATIONAL HEALTH INSURANCE OR SOME OTHER TYPE OF UNIVERSAL HEALTH CARE SYSTEM	44.8	41.2	38.7	40.7	44.4	51.2	60.0	61.5	37.5
CAP HEALTH-CARE PROVIDER COMPENSATION	18.8	23.5	22.6	18.5	11.1	16.3	6.7	7.7	31.3
SHIFT A GREATER AMOUNT OF THE COST BURDEN TO THE EMPLOYEE	10.8	5.9	16.1	11.1	16.7	4.7	13.3	15.4	9.4
CHANGE EMPLOYEE ATTITUDE AND BEHAVIOR BY WELLNESS AND HEALTH PROMOTION PROGRAMS	9.4	11.8	6.5	13.0	27.8	2.3	-	-	12.5
CONTROL UTILIZATION OF MEDICAL SERVICES THROUGH MANAGED CARE APPROACHES	4.5	11.8	3.2	5.6	-	2.3	6.7	7.7	3.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 103A
PRECENTAGE OF COMPANIES IN FAVOR OF INTRODUCING THE FOLLOWING HEALTH CARE MECHANISMS

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT 1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	223	16	207	76	60	22	34
TAX INCENTIVES TO ENCOURAGE INDIVIDUALS TO BUY LONG-TERM CARE INSURANCE	49.3%	37.5%	50.2%	51.3%	45.0%	50.0%	52.9%
TAX-FREE SAVINGS ACCOUNTS FOR INDIVIDUALS TO PURCHASE MEDICAL CARE	43.5	37.5	44.0	43.4	30.0	59.1	61.8
GOVERNMENT PROVIDED HEALTH-CARE SERVICES	26.9	37.5	26.1	27.6	26.3	36.4	17.6
A VOUCHER PROGRAM TO ENABLE INDIVIDUALS TO BUY MEDICAL CARE	21.5	25.0	21.3	19.7	22.5	31.8	17.6
REQUIRED (MANDATED) EMPLOYER-PROVIDED BENEFITS	10.8	6.3	11.1	7.9	11.3	13.6	17.6
NONE OF THE ABOVE	29.1	25.0	29.5	30.3	33.8	22.7	23.5

TABLE 103B
PRECENTAGE OF COMPANIES IN FAVOR OF INTRODUCING THE FOLLOWING HEALTH CARE MECHANISMS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
TAX INCENTIVES TO ENCOURAGE INDIVIDUALS TO BUY LONG-TERM CARE INSURANCE	49.3%	52.9%	51.6%	55.6%	44.4%	41.9%	40.0%	46.2%	53.1%
TAX-FREE SAVINGS ACCOUNTS FOR INDIVIDUALS TO PURCHASE MEDICAL CARE	43.5	47.1	51.6	53.7	33.3	25.6	33.3	46.2	50.0
GOVERNMENT PROVIDED HEALTH-CARE SERVICES	26.9	47.1	32.3	37.0	33.3	9.3	26.7	7.7	21.9
A VOUCHER PROGRAM TO ENABLE INDIVIDUALS TO BUY MEDICAL CARE	21.5	35.3	25.8	24.1	33.3	11.6	26.7	7.7	15.6
REQUIRED (MANDATED) EMPLOYER-PROVIDED BENEFITS	10.8	11.8	6.5	20.4	-	4.7	13.3	15.4	9.4
NONE OF THE ABOVE	29.1	23.5	9.7	14.8	33.3	51.2	46.7	38.5	31.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 104A
PERCENTAGE OF RESPONDENTS IN FAVOR OF A UNIVERSAL HEALTH-CARE SYSTEM

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT 1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	220	16	204	75	78	22	34
PERCENTAGE IN FAVOR OF A UNIVERSAL HEALTH-CARE SYSTEM	35.9%	37.5%	35.8%	48.0%	25.6%	45.5%	26.5%
FINANCED BY A TAX ON CIGARETTES/ALCOHOL	51.9	50.0	52.1	52.8	35.0	50.0	88.9
FINANCED BY A SALES TAX	31.6	-	34.2	27.8	50.0	30.0	11.1
FINANCED BY INCOME TAX	15.2	50.0	12.3	16.7	15.0	20.0	-
FINANCED BY ALL OF THE ABOVE	1.3	-	1.4	2.8	-	-	-
PERCENTAGE NOT IN FAVOR OF A UNIVERSAL HEALTH-CARE SYSTEM	64.1	62.5	64.2	52.0	74.4	54.5	73.5

TABLE 104B
PERCENTAGE OF RESPONDENTS IN FAVOR OF A UNIVERSAL HEALTH-CARE SYSTEM

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	220	17	31	52	18	43	14	13	32
PERCENTAGE IN FAVOR OF A UNIVERSAL HEALTH-CARE SYSTEM	35.9%	47.1%	35.5%	46.2%	38.9%	18.6%	35.7%	30.8%	37.5%
FINANCED BY A TAX ON CIGARETTES/ALCOHOL	51.9	75.0	54.5	50.0	28.6	75.0	40.0	100.0	25.0
FINANCED BY A SALES TAX	31.6	12.5	27.3	33.3	57.1	25.0	40.0	-	41.7
FINANCED BY INCOME TAX	15.2	12.5	18.2	16.7	14.3	-	20.0	-	25.0
FINANCED BY ALL OF THE ABOVE	1.3	-	-	-	-	-	-	-	8.3
PERCENTAGE NOT IN FAVOR OF A UNIVERSAL HEALTH-CARE SYSTEM	64.1	52.9	64.5	53.8	61.1	81.4	64.3	69.2	62.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 105A
MOST IMPORTANT ROLE OF THE AMERICAN HEALTH-CARE SYSTEM

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	210	16	194	71	72	22	34
MOST IMPORTANT ROLE							
THE SYSTEM SHOULD SEEK ALL POSSIBLE METHODS TO CONTROL COSTS	40.5%	25.0%	41.8%	29.6%	52.8%	54.5%	32.4%
THE SYSTEM SHOULD AIM TO ENSURE THAT ALL FAMILIES DO NOT SUFFER CATASTROPHIC FINANCIAL LOSSES BECAUSE OF ILL HEALTH	34.8	50.0	33.5	33.8	30.6	27.3	47.1
THE AMERICAN HEALTH-CARE SYSTEM SHOULD PROVIDE ALL CITIZENS WITH ADEQUATE HEALTH-CARE SERVICES	24.8	25.0	24.7	36.6	16.7	18.2	20.6
SECOND MOST IMPORTANT ROLE							
THE SYSTEM SHOULD AIM TO ENSURE THAT ALL FAMILIES DO NOT SUFFER CATASTROPHIC FINANCIAL LOSSES BECAUSE OF ILL HEALTH	42.9	37.5	43.3	35.2	43.1	54.5	47.1
THE SYSTEM SHOULD SEEK ALL POSSIBLE METHODS TO CONTROL COSTS	35.7	43.8	35.1	38.0	33.3	27.3	44.1
THE AMERICAN HEALTH-CARE SYSTEM SHOULD PROVIDE ALL CITIZENS WITH ADEQUATE HEALTH-CARE SERVICES	21.4	18.8	21.6	26.8	23.6	18.2	8.8
THIRD MOST IMPORTANT ROLE							
THE AMERICAN HEALTH-CARE SYSTEM SHOULD PROVIDE ALL CITIZENS WITH ADEQUATE HEALTH-CARE SERVICES	53.8	56.3	53.6	36.6	59.7	63.6	70.6
THE SYSTEM SHOULD SEEK ALL POSSIBLE METHODS TO CONTROL COSTS	23.8	31.3	23.2	32.4	13.9	18.2	23.5
THE SYSTEM SHOULD AIM TO ENSURE THAT ALL FAMILIES DO NOT SUFFER CATASTROPHIC FINANCIAL LOSSES BECAUSE OF ILL HEALTH	22.4	12.5	23.2	31.0	26.4	18.2	5.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 105B

MOST IMPORTANT ROLE OF THE AMERICAN HEALTH-CARE SYSTEM

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	210	17	30	50	18	41	13	11	30
MOST IMPORTANT ROLE									
THE SYSTEM SHOULD SEEK ALL POSSIBLE METHODS TO CONTROL COSTS	40.5%	29.4%	36.7%	24.0%	44.4%	56.1%	53.8%	54.5%	43.3%
THE SYSTEM SHOULD AIM TO ENSURE THAT ALL FAMILIES DO NOT SUFFER CATASTROPHIC FINANCIAL LOSSES BECAUSE OF ILL HEALTH	34.8	47.1	26.7	42.0	16.7	36.6	38.5	27.3	33.3
THE AMERICAN HEALTH-CARE SYSTEM SHOULD PROVIDE ALL CITIZENS WITH ADEQUATE HEALTH-CARE SERVICES	24.8	23.5	36.7	34.0	38.9	7.3	7.7	18.2	23.3
SECOND MOST IMPORTANT ROLE									
THE SYSTEM SHOULD AIM TO ENSURE THAT ALL FAMILIES DO NOT SUFFER CATASTROPHIC FINANCIAL LOSSES BECAUSE OF ILL HEALTH	42.9	41.2	53.3	38.0	44.4	41.5	38.5	54.5	40.0
THE SYSTEM SHOULD SEEK ALL POSSIBLE METHODS TO CONTROL COSTS	35.7	35.3	33.3	42.0	38.9	34.1	38.5	36.4	26.7
THE AMERICAN HEALTH-CARE SYSTEM SHOULD PROVIDE ALL CITIZENS WITH ADEQUATE HEALTH-CARE SERVICES	21.4	23.5	13.3	20.0	16.7	24.4	23.1	9.1	33.3
THIRD MOST IMPORTANT ROLE									
THE AMERICAN HEALTH-CARE SYSTEM SHOULD PROVIDE ALL CITIZENS WITH ADEQUATE HEALTH-CARE SERVICES	53.8	52.9	50.0	46.0	44.4	68.3	69.2	72.7	43.3
THE SYSTEM SHOULD SEEK ALL POSSIBLE METHODS TO CONTROL COSTS	23.8	35.3	30.0	34.0	16.7	9.8	7.7	9.1	30.0
THE SYSTEM SHOULD AIM TO ENSURE THAT ALL FAMILIES DO NOT SUFFER CATASTROPHIC FINANCIAL LOSSES BECAUSE OF ILL HEALTH	22.4	11.8	20.0	20.0	38.9	22.0	23.1	18.2	26.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 106A
OPINIONS OF HEALTH CARE

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT 1 STORE	 2 - 10 STORES	 11 - 49 STORES	 50 + STORES
TOTAL COMPANIES	223	16	207	76	80	22	34
PERCENTAGE OF RESPONDENTS WHO THINK EVERY RESIDENT SHOULD, BY LAW, BE ENROLLED IN AN ADEQUATE HEALTH-CARE PLAN TO COVER CATASTROPHIC HEALTH-CARE COSTS	43.0%	50.0%	42.5%	40.8%	40.0%	68.2%	38.2%
PERCENTAGE WHO THINK HEALTH-CARE SHOULD BE:							
AN INDIVIDUAL RESPONSIBILITY	73.5	75.0	73.4	76.3	75.0	59.1	76.5
A GOVERNMENT RESPONSIBILITY	15.7	18.8	15.5	14.5	16.3	27.3	5.9
AN EMPLOYER RESPONSIBILITY	8.1	6.3	8.2	7.9	5.0	9.1	14.7
SHARED BY INDIVIDUAL AND EMPLOYER	.4	-	.5	-	-	-	2.9
SHARED BY INDIVIDUAL AND GOVERNMENT	.4	-	.5	1.3	-	-	-
PERCENTAGE WHO THINK THE ROLE OF THE GOVERNMENT SHOULE BE:							
TO MONITOR THE HEALTH MARKET	59.6	81.3	58.0	51.3	58.8	63.6	73.5
TO SUBSIDIZE NEEDY INDIVIDUALS TO ALLOW THEM TO OBTAIN EFFICIENT SERVICE	50.7	62.5	49.8	50.0	46.3	54.5	58.8
TO ENCOURAGE COMPETITION	60.5	62.5	60.4	55.3	58.8	54.5	73.5
PERCENTAGE WHO WOULD SUPPORT A HEALTH SYSTEM INCLUDING ALL OF THE FOLLOWING: GOVERNMENT CONTROL OR OWNERSHIP OF HOSPITALS, PHYSICIANS EMPLOYED DIRECTLY BY THE GOVERNMENT OR WORKING UNDER CONTRACT TO THE GOVERNMENT AND FINANCED THROUGH GENERAL TAX REVENUE	15.7	18.8	15.5	18.4	12.5	22.7	8.8
PERCENTAGE WHO BELIEVE IT IS NECESSARY TO PROVIDE HEALTH-CARE BENEFITS TO RETAIN EMPLOYEES	91.0	100.0	90.3	81.6	95.0	100.0	97.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 106B
OPINIONS OF HEALTH CARE

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
PERCENTAGE OF RESPONDENTS WHO THINK EVERY RESIDENT SHOULD, BY LAW, BE ENROLLED IN AN ADEQUATE HEALTH-CARE PLAN TO COVER CATASTROPHIC HEALTH-CARE COSTS	43.0%	64.7%	58.1%	44.4%	44.4%	14.0%	53.3%	23.1%	56.3%
PERCENTAGE WHO THINK HEALTH-CARE SHOULD BE:									
AN INDIVIDUAL RESPONSIBILITY	73.5	64.7	61.3	66.7	88.9	95.3	86.7	69.2	59.4
A GOVERNMENT RESPONSIBILITY	15.7	17.6	22.6	24.1	5.6	2.3	13.3	7.7	21.9
AN EMPLOYER RESPONSIBILITY	8.1	17.6	12.9	5.6	5.6	2.3	-	7.7	15.6
TO MONITOR THE HEALTH MARKET	59.6	70.6	71.0	55.6	66.7	55.8	60.0	53.8	53.1
TO SUBSIDIZE NEEDY INDIVIDUALS TO ALLOW THEM TO OBTAIN EFFICIENT SERVICE	50.7	76.5	48.4	48.1	50.0	46.5	46.7	46.2	53.1
TO ENCOURAGE COMPETITION	60.5	47.1	64.5	61.1	66.7	69.8	46.7	61.5	53.1
PERCENTAGE WHO WOULD SUPPORT A HEALTH SYSTEM INCLUDING ALL OF THE FOLLOWING: GOVERNMENT CONTROL OR OWNERSHIP OF HOSPITALS, PHYSICIANS EMPLOYED DIRECTLY BY THE GOVERNMENT OR WORKING UNDER CONTRACT TO THE GOVERNMENT, AND FINANCED THROUGH GENERAL TAX REVENUE	15.7	17.6	29.0	18.5	11.1	4.7	13.3	7.7	18.8
PERCENTAGE WHO BELIEVE IT IS NECESSARY TO PROVIDE HEALTH-CARE BENEFITS TO RETAIN EMPLOYEES	91.0	82.4	96.8	92.6	94.4	88.4	86.7	92.3	90.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 199)

TABLE 107A

OPINIONS ON VARIOUS ASPECTS OF THE HEALTH-CARE SYSTEM

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	223	16	207	76	80	22	34
CHOICE OF CARE AND FACILITY							
INDIVIDUAL FREE CHOICE	96.4%	100.0%	96.1%	97.4%	95.0%	100.0%	94.1%
GOVERNMENT DECISIONS	3.6	-	3.9	2.6	5.0	-	5.9
CONTROL OF HEALTH FACILITIES							
PUBLICLY OWNED	23.3	18.8	23.7	28.9	21.3	22.7	14.7
PRIVATELY OWNED	72.2	81.3	71.5	68.4	71.3	77.3	82.4
DETERMINATION OF PRICES AND FEES							
FEDERAL GOVERNMENT REGULATIONS	19.7	18.8	19.8	22.4	22.5	22.7	5.9
STATE/LOCAL CONTROL	12.1	18.8	11.6	14.5	7.5	9.1	14.7
FREE MARKET MECHANISM	53.4	62.5	52.7	44.7	55.0	54.5	67.6
INSURANCE PROVIDERS	13.0	-	14.0	17.1	11.3	13.6	11.8
HEALTH-CARE PRACTITIONERS' EMPLOYMENT							
FEDERAL EMPLOYEES	4.9	6.3	4.8	6.6	5.0	4.5	-
STATE/LOCAL EMPLOYEES	7.6	6.3	7.7	9.2	6.3	-	8.8
PRIVATE PRACTITIONERS	82.5	81.3	82.6	77.6	85.0	95.5	82.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 107B

OPINIONS ON VARIOUS ASPECTS OF THE HEALTH-CARE SYSTEM

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
CHOICE OF CARE AND FACILITY									
INDIVIDUAL FREE CHOICE	96.4%	94.1%	93.5%	96.3%	100.0%	100.0%	100.0%	92.3%	93.8%
GOVERNMENT DECISIONS	3.6	5.9	6.5	3.7	-	-	-	7.7	6.3
CONTROL OF HEALTH FACILITIES									
PUBLICLY OWNED	23.3	23.5	32.3	31.5	5.6	20.9	20.0	7.7	21.9
PRIVATELY OWNED	72.2	70.6	64.5	68.5	88.9	69.8	80.0	84.6	71.9
DETERMINATION OF PRICES AND FEES									
FEDERAL GOVERNMENT REGULATIONS	19.7	17.6	25.8	16.7	27.8	11.6	20.0	-	34.4
STATE/LOCAL CONTROL	12.1	29.4	12.9	18.5	-	4.7	6.7	23.1	6.3
FREE MARKET MECHANISM	53.4	41.2	41.9	53.7	55.6	67.4	60.0	69.2	40.6
INSURANCE PROVIDERS	13.0	5.9	19.4	11.1	11.1	16.3	13.3	7.7	12.5
HEALTH-CARE PRACTITIONERS' EMPLOYMENT									
FEDERAL EMPLOYEES	4.9	5.9	6.5	7.4	-	2.3	6.7	-	6.3
STATE/LOCAL EMPLOYEES	7.6	-	9.7	14.8	5.6	4.7	6.7	7.7	3.1
PRIVATE PRACTITIONERS	82.5	94.1	83.9	77.8	88.9	83.7	86.7	84.6	75.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 106A

OPINIONS ON THE ORIENTATION OF THE HEALTH-CARE SYSTEM

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	223	16	207	76	80	22	34
MOST IMPORTANT ASPECT OF HEALTH-CARE							
HEALTH CARE COSTS MUST BE CONTROLLED	58.7%	62.5%	58.5%	52.6%	58.8%	68.2%	67.6%
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	23.8	31.3	23.2	22.4	27.5	18.2	23.5
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	10.8	6.3	11.1	17.1	6.3	13.6	2.9
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	5.4	-	5.8	7.9	5.0	-	2.9
SECOND MOST IMPORTANT ASPECT OF HEALTH-CARE							
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	39.9	37.5	40.1	27.6	42.5	59.1	55.9
HEALTH CARE COSTS MUST BE CONTROLLED	22.9	25.0	22.7	27.6	22.5	13.6	14.7
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	20.6	12.5	21.3	21.1	22.5	18.2	14.7
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	15.7	25.0	15.0	23.7	10.0	9.1	14.7
THIRD MOST IMPORTANT ASPECT OF HEALTH-CARE							
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	39.0	68.8	36.7	28.9	38.8	59.1	47.1
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	26.9	12.5	28.0	36.8	23.8	9.1	20.6
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	17.9	12.5	18.4	17.1	21.3	18.2	14.7
HEALTH CARE COSTS MUST BE CONTROLLED	13.9	6.3	14.5	17.1	10.0	13.6	17.6

Continued

TABLE 108A

OPINIONS ON THE ORIENTATION OF THE HEALTH-CARE SYSTEM

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
FOURTH MOST IMPORTANT ASPECT OF HEALTH-CARE							
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	53.4	56.3	53.1	42.1	56.3	59.1	67.6
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	34.1	18.8	35.3	42.1	31.3	22.7	35.3
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	8.5	18.8	7.7	13.2	3.8	13.6	-
HEALTH CARE COSTS MUST BE CONTROLLED	2.7	6.3	2.4	2.6	3.8	4.5	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 108B
OPINIONS ON THE ORIENTATION OF THE HEALTH-CARE SYSTEM

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	223	17	31	54	18	43	15	13	32
MOST IMPORTANT ASPECT OF HEALTH-CARE									
HEALTH CARE COSTS MUST BE CONTROLLED	58.7%	70.6%	64.5%	63.0%	44.4%	60.5%	40.0%	46.2%	59.4%
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	23.8	11.8	22.6	22.2	22.2	25.6	46.7	38.5	15.6
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	10.8	11.8	12.9	13.0	11.1	-	13.3	-	21.9
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	5.4	5.9	-	1.9	22.2	14.0	-	-	-
SECOND MOST IMPORTANT ASPECT OF HEALTH-CARE									
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	39.9	47.1	38.7	40.7	38.9	48.8	26.7	23.1	37.5
HEALTH CARE COSTS MUST BE CONTROLLED	22.9	23.5	22.6	20.4	38.9	16.3	26.7	7.7	31.3
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	20.6	11.8	12.9	25.9	5.6	27.9	26.7	38.5	12.5
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	15.7	17.6	25.8	13.0	16.7	7.0	20.0	15.4	18.8
THIRD MOST IMPORTANT ASPECT OF HEALTH-CARE									
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	39.0	35.3	45.2	38.9	50.0	39.5	40.0	23.1	34.4
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	26.9	29.4	29.0	22.2	22.2	25.6	20.0	23.1	40.6
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	17.9	23.5	16.1	24.1	16.7	16.3	13.3	7.7	15.6
HEALTH CARE COSTS MUST BE CONTROLLED	13.9	5.9	6.5	14.8	11.1	18.6	26.7	23.1	9.4

Continued

TABLE 108B

OPINIONS ON THE ORIENTATION OF THE HEALTH-CARE SYSTEM

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
FOURTH MOST IMPORTANT ASPECT OF HEALTH-CARE									
UNIVERSAL HEALTH COVERAGE SHOULD BE MADE AVAILABLE	53.4	41.2	41.9	50.0	55.6	76.7	53.3	53.8	43.8
PHYSICIANS SHOULD BE ABLE TO FUNCTION WITH A MINIMUM OF GOVERNMENT REGULATION	34.1	41.2	41.9	33.3	22.2	18.6	33.3	30.8	53.1
CONSUMERS SHOULD HAVE THE FREE CHOICE OF MEDICAL CARE PROVIDERS	8.5	11.8	9.7	14.8	16.7	-	6.7	-	6.3
HEALTH CARE COSTS MUST BE CONTROLLED	2.7	-	3.2	1.9	5.6	4.7	6.7	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 109A
PERCENTAGE OF COMPANIES PROVIDING MEDICAL PLAN COVERAGE

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES	221	16	205	75	80	22	33
PERCENTAGE WITH PLANS FOR BOTH SALARIED AND HOURLY EMPLOYEES	94.1%	100.0%	93.7%	84.0%	98.8%	100.0%	100.0%
PERCENTAGE WITH PLANS FOR SALARIED EMPLOYEES ONLY	4.5	-	4.9	12.0	1.3	-	-
PERCENTAGE WITH PLANS FOR HOURLY EMPLOYEES ONLY	.9	-	1.0	2.7	-	-	-
PERCENTAGE WITH NO MEDICAL PLAN COVERAGE	.5	-	.5	1.3	-	-	-

TABLE 109B
PERCENTAGE OF COMPANIES PROVIDING MEDICAL PLAN COVERAGE

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES	221	17	31	54	18	42	14	13	32
PERCENTAGE WITH PLANS FOR BOTH SALARIED AND HOURLY EMPLOYEES	94.1	94.1	93.5	94.4	88.9	95.2	100.0	100.0	90.6
PERCENTAGE WITH PLANS FOR SALARIED EMPLOYEES ONLY	4.5	-	6.5	5.6	5.6	4.8	-	-	6.3
PERCENTAGE WITH PLANS FOR HOURLY EMPLOYEES ONLY	.9	-	-	-	5.6	-	-	-	3.1
PERCENTAGE WITH NO MEDICAL PLAN COVERAGE	.5	5.9	-	-	-	-	-	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 110A
MEDICAL PLAN INFORMATION

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	210	16	194	65	79	22	33
NUMBER OF COMPANIES	204	16	188	64	76	22	31
AVERAGE NUMBER OF HOURS AN HOURLY EMPLOYEE MUST WORK PER WEEK TO BE INCLUDED IN THE MEDICAL PLAN	29.7	32.4	29.4	30.0	30.4	28.5	27.7
NUMBER OF COMPANIES	202	16	186	63	77	22	29
AVERAGE NUMBER OF DAYS AN HOURLY EMPLOYEE MUST WORK PER WEEK TO BE INCLUDED IN THE MEDICAL PLAN	82.5	46.0	85.7	80.7	89.4	75.7	71.4
NUMBER OF COMPANIES	206	16	190	63	77	22	33
PERCENTAGE WITHOUT A UNION NEGOTIATED, COLLECTIVELY BARGAINED PLAN AT ANY LOCATION	63.6	31.3	66.3	87.3	71.4	40.9	27.3
PERCENTAGE WITH A UNION NEGOTIATED, COLLECTIVELY BARGAINED PLAN AT SOME LOCATIONS	22.3	50.0	20.0	-	19.5	36.4	60.6
PERCENTAGE WITH A UNION NEGOTIATED, COLLECTIVELY BARGAINED PLAN AT ALL LOCATIONS	14.1	18.8	13.7	12.7	9.1	22.7	12.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 110B
MEDICAL PLAN INFORMATION

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	210	16	29	51	17	40	14	13	30
NUMBER OF COMPANIES	204	15	28	49	17	38	14	13	30
AVERAGE NUMBER OF HOURS AN HOURLY EMPLOYEE MUST WORK PER WEEK TO BE INCLUDED IN THE MEDICAL PLAN	29.7	31.1	26.1	31.8	30.4	32.4	33.2	27.0	24.5
NUMBER OF COMPANIES	202	16	27	49	17	38	14	13	28
AVERAGE NUMBER OF DAYS AN HOURLY EMPLOYEE MUST WORK PER WEEK TO BE INCLUDED IN THE MEDICAL PLAN	82.5	88.0	107.8	62.0	60.1	95.0	99.0	94.6	73.9
NUMBER OF COMPANIES	206	16	29	48	17	39	14	13	30
PERCENTAGE WITHOUT A UNION NEGOTIATED, COLLECTIVELY BARGAINED PLAN AT ANY LOCATION	63.6	56.3	27.6	75.0	47.1	84.6	78.6	84.6	50.0
PERCENTAGE WITH A UNION NEGOTIATED, COLLECTIVELY BARGAINED PLAN AT SOME LOCATIONS	22.3	25.0	48.3	16.7	35.3	10.3	14.3	15.4	20.0
PERCENTAGE WITH A UNION NEGOTIATED, COLLECTIVELY BARGAINED PLAN AT ALL LOCATIONS	14.1	18.8	24.1	8.3	17.6	5.1	7.1	-	30.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 111A

AVERAGE COSTS FOR INDIVIDUAL HOURLY EMPLOYEE MEDICAL PLANS - FOR 1987

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
NUMBER OF COMPANIES	124	7	117	39	48	15	18
AVERAGE MONTHLY PLAN PREMIUMS	$93	$142	$90	$97	$90	$97	$76
NUMBER OF COMPANIES	122	10	112	36	44	15	22
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$12	$1	$13	$21	$14	$1	$3
NUMBER OF COMPANIES	142	12	130	43	50	17	26
AVERAGE DEDUCTIBLE AMOUNT	$141	$129	$143	$155	$145	$115	$148
NUMBER OF COMPANIES	121	12	109	33	43	15	25
AVERAGE COINSURANCE PERCENTAGE	72.4	74.2	72.2	64.8	74.9	71.3	77.2
NUMBER OF COMPANIES	122	11	111	35	43	16	24
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1206	$927	$1233	$1150	$1302	$944	$1345

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 111B

AVERAGE COSTS FOR INDIVIDUAL HOURLY EMPLOYEE MEDICAL PLANS - FOR 1987

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
NUMBER OF COMPANIES	124	9	20	34	9	21	11	4	16
AVERAGE MONTHLY PLAN PREMIUMS	$93	$96	$111	$85	$79	$93	$100	$95	$85
NUMBER OF COMPANIES	122	8	20	32	9	22	11	6	14
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$12	$7	$25	$8	$6	$16	$17	$11	$3
NUMBER OF COMPANIES	142	10	22	37	12	25	12	10	14
AVERAGE DEDUCTIBLE AMOUNT	$141	$105	$108	$139	$135	$169	$204	$195	$93
NUMBER OF COMPANIES	121	8	20	34	8	20	10	10	11
AVERAGE COINSURANCE PERCENTAGE	72.4	72.5	70.0	69.0	81.9	77.0	74.0	81.0	62.7
NUMBER OF COMPANIES	122	8	19	34	11	22	12	9	7
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1206	$925	$761	$1475	$809	$1016	$1163	$1500	$2342

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 112A

AVERAGE COSTS FOR INDIVIDUAL HOURLY EMPLOYEE MEDICAL PLANS - FOR 1988

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
NUMBER OF COMPANIES	140	8	132	46	54	16	20
AVERAGE MONTHLY PLAN PREMIUMS	$105	$153	$102	$121	$97	$106	$78
NUMBER OF COMPANIES	131	11	120	39	47	16	24
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$15	$5	$16	$23	$18	$2	$6
NUMBER OF COMPANIES	148	12	136	45	53	18	26
AVERAGE DEDUCTIBLE AMOUNT	$161	$133	$164	$179	$169	$133	$156
NUMBER OF COMPANIES	127	12	115	35	45	16	26
AVERAGE COINSURANCE PERCENTAGE	72.1	74.2	71.9	64.9	73.8	72.5	77.3
NUMBER OF COMPANIES	129	11	118	38	45	17	25
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1152	$927	$1173	$1204	$1144	$829	$1351

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 112B

AVERAGE COSTS FOR INDIVIDUAL HOURLY EMPLOYEE MEDICAL PLANS - FOR 1988

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
NUMBER OF COMPANIES	140	10	20	37	12	28	12	5	16
AVERAGE MONTHLY PLAN PREMIUMS	$105	$110	$132	$110	$79	$98	$105	$107	$87
NUMBER OF COMPANIES	131	8	20	32	13	27	12	7	12
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$15	$14	$28	$11	$5	$16	$21	$14	$5
NUMBER OF COMPANIES	148	10	21	37	14	29	13	10	14
AVERAGE DEDUCTIBLE AMOUNT	$161	$120	$106	$145	$173	$195	$238	$220	$118
NUMBER OF COMPANIES	127	8	20	34	9	24	11	10	11
AVERAGE COINSURANCE PERCENTAGE	72.1	72.5	70.3	68.4	81.1	74.6	75.5	81.0	62.7
NUMBER OF COMPANIES	129	8	19	34	13	27	13	9	6
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1152	$925	$761	$1485	$827	$1081	$1238	$1472	$1158

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETINC INDUSTRY SPEAKS, 1990

TABLE 113A

AVERAGE COSTS FOR INDIVIDUAL HOURLY EMPLOYEE MEDICAL PLANS - FOR 1989

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
NUMBER OF COMPANIES	150	11	139	48	58	16	20
AVERAGE MONTHLY PLAN PREMIUMS	$124	$161	$121	$143	$113	$130	$98
NUMBER OF COMPANIES	143	12	131	43	51	17	24
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$18	$11	$19	$27	$22	$4	$9
NUMBER OF COMPANIES	157	13	144	45	59	18	26
AVERAGE DEDUCTIBLE AMOUNT	$169	$146	$171	$193	$171	$147	$163
NUMBER OF COMPANIES	137	13	124	37	50	17	26
AVERAGE COINSURANCE PERCENTAGE	71.9	74.6	71.6	64.6	74.5	69.4	76.9
NUMBER OF COMPANIES	141	12	129	41	50	18	25
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1315	$1104	$1335	$1335	$1421	$889	$1447

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 113B

AVERAGE COSTS FOR INDIVIDUAL HOURLY EMPLOYEE MEDICAL PLANS - FOR 1989

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
NUMBER OF COMPANIES	150	10	22	37	13	32	12	6	18
AVERAGE MONTHLY PLAN PREMIUMS	$124	$142	$155	$125	$102	$114	$122	$102	$117
NUMBER OF COMPANIES	143	9	21	34	14	31	12	8	14
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$18	$22	$29	$14	$6	$22	$28	$15	$8
NUMBER OF COMPANIES	157	10	21	38	15	32	14	11	16
AVERAGE DEDUCTIBLE AMOUNT	$169	$130	$110	$152	$178	$204	$232	$223	$138
NUMBER OF COMPANIES	137	8	21	34	10	29	12	11	12
AVERAGE COINSURANCE PERCENTAGE	71.9	72.5	67.9	67.8	80.5	74.4	75.8	80.0	65.8
NUMBER OF COMPANIES	141	8	20	34	14	33	14	10	8
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1315	$875	$783	$1522	$918	$1202	$1882	$1900	$1650

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 114A

AVERAGE COSTS FOR HOURLY EMPLOYEE FAMILY MEDICAL PLAN - FOR 1987

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
NUMBER OF COMPANIES	124	7	117	38	50	16	17
AVERAGE MONTHLY PLAN PREMIUMS	$182	$198	$181	$182	$188	$190	$160
NUMBER OF COMPANIES	115	10	105	32	43	14	21
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$39	$5	$43	$40	$61	$19	$15
NUMBER OF COMPANIES	135	11	124	38	51	18	22
AVERAGE DEDUCTIBLE AMOUNT	$222	$214	$222	$228	$218	$217	$253
NUMBER OF COMPANIES	116	11	105	28	45	16	22
AVERAGE COINSURANCE PERCENTAGE	74.0	73.6	74.0	70.7	74.9	72.5	76.1
NUMBER OF COMPANIES	118	10	108	31	46	16	21
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1531	$930	$1587	$1537	$1589	$1087	$1885

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 114B

AVERAGE COSTS FOR HOURLY EMPLOYEE FAMILY MEDICAL PLAN - FOR 1987

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
NUMBER OF COMPANIES	124	10	20	34	10	21	11	7	11
AVERAGE MONTHLY PLAN PREMIUMS	$182	$218	$188	$185	$160	$166	$179	$179	$183
NUMBER OF COMPANIES	115	8	18	32	9	20	11	8	9
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$39	$24	$5	$42	$48	$62	$71	$37	$16
NUMBER OF COMPANIES	135	9	20	38	11	24	12	11	10
AVERAGE DEDUCTIBLE AMOUNT	$222	$172	$194	$229	$207	$236	$221	$314	$177
NUMBER OF COMPANIES	116	8	20	32	9	19	10	11	7
AVERAGE COINSURANCE PERCENTAGE	74.0	72.5	70.0	70.8	82.2	76.8	74.0	80.9	72.9
NUMBER OF COMPANIES	118	8	19	34	11	20	12	10	4
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1531	$1375	$1000	$1695	$1332	$1637	$1379	$2230	$1700

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 115A

AVERAGE COSTS FOR HOURLY EMPLOYEE FAMILY MEDICAL PLAN - FOR 1988

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
NUMBER OF COMPANIES	139	8	131	44	56	17	19
AVERAGE MONTHLY PLAN PREMIUMS	$211	$230	$209	$214	$215	$226	$181
NUMBER OF COMPANIES	127	11	116	36	48	15	23
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$43	$7	$46	$49	$58	$29	$19
NUMBER OF COMPANIES	144	12	132	42	54	19	23
AVERAGE DEDUCTIBLE AMOUNT	$268	$208	$273	$258	$301	$234	$274
NUMBER OF COMPANIES	125	12	113	31	48	17	24
AVERAGE COINSURANCE PERCENTAGE	73.2	74.2	73.1	70.6	72.3	73.5	76.7
NUMBER OF COMPANIES	128	11	117	34	50	17	23
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1552	$936	$1610	$1622	$1573	$1159	$1834

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 115B

AVERAGE COSTS FOR HOURLY EMPLOYEE FAMILY MEDICAL PLAN - FOR 1988

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
NUMBER OF COMPANIES	139	10	20	37	13	28	12	8	11
AVERAGE MONTHLY PLAN PREMIUMS	$211	$246	$225	$216	$182	$194	$204	$205	$220
NUMBER OF COMPANIES	127	8	18	33	11	27	12	9	9
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$43	$34	$9	$30	$44	$66	$89	$49	$29
NUMBER OF COMPANIES	144	9	19	39	13	30	13	11	10
AVERAGE DEDUCTIBLE AMOUNT	$268	$200	$201	$238	$240	$363	$254	$355	$242
NUMBER OF COMPANIES	125	8	20	33	10	25	11	11	7
AVERAGE COINSURANCE PERCENTAGE	73.2	72.5	70.3	70.5	82.0	71.6	75.5	80.9	72.9
NUMBER OF COMPANIES	128	8	19	34	13	27	13	10	4
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1552	$1500	$1000	$1715	$1342	$1522	$1538	$2345	$1837

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 116A

AVERAGE COSTS FOR HOURLY EMPLOYEE FAMILY MEDICAL PLAN - FOR 1989

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
NUMBER OF COMPANIES	150	11	139	46	60	17	19
AVERAGE MONTHLY PLAN PREMIUMS	$254	$274	$252	$252	$257	$276	$228
NUMBER OF COMPANIES	138	12	126	39	53	16	23
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$56	$20	$59	$61	$75	$38	$28
NUMBER OF COMPANIES	152	13	139	41	60	20	23
AVERAGE DEDUCTIBLE AMOUNT	$252	$227	$254	$270	$242	$245	$283
NUMBER OF COMPANIES	133	13	120	31	53	18	24
AVERAGE COINSURANCE PERCENTAGE	73.5	74.6	73.4	69.4	74.7	70.6	76.5
NUMBER OF COMPANIES	138	12	126	35	55	18	23
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1691	$1208	$1737	$1803	$1729	$1256	$1938

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 116B

AVERAGE COSTS FOR HOURLY EMPLOYEE FAMILY MEDICAL PLAN - FOR 1989

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
NUMBER OF COMPANIES	150	10	22	37	13	32	12	9	15
AVERAGE MONTHLY PLAN PREMIUMS	$254	$315	$283	$265	$208	$232	$243	$222	$254
NUMBER OF COMPANIES	138	8	19	33	11	31	12	10	14
AVERAGE MONTHLY EMPLOYEE CONTRIBUTIONS	$56	$54	$13	$38	$60	$92	$103	$51	$39
NUMBER OF COMPANIES	152	10	20	39	13	31	13	12	14
AVERAGE DEDUCTIBLE AMOUNT	$252	$190	$206	$248	$263	$264	$262	$363	$232
NUMBER OF COMPANIES	133	8	21	33	10	28	11	12	10
AVERAGE COINSURANCE PERCENTAGE	73.5	72.5	67.9	69.8	82.0	74.1	75.5	80.0	78.0
NUMBER OF COMPANIES	138	8	20	35	13	31	13	11	7
AVERAGE MAXIMUM OUT-OF-POCKET EXPENSE PAID BEFORE ALL EXPENSES ARE PAID BY THE PLAN	$1691	$1450	$1010	$1806	$1415	$1673	$1935	$2655	$1957

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 117A
TYPES OF FUNDING METHODS USED FOR HOURLY MEDICAL PLANS

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT			
				1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	192	16	176	56	74	20	31
PURCHASED THROUGH A COMMERCIAL INSURANCE COMPANY	54.7%	50.0%	55.1%	71.4%	67.6%	20.0%	12.9%
A COMBINATION OF BOTH	23.4	25.0	23.3	12.5	20.3	45.0	35.5
SELF-FUNDED MEDICAL PLAN	21.9	25.0	21.6	16.1	12.2	35.0	51.6

TABLE 117B
TYPES OF FUNDING METHODS USED FOR HOURLY MEDICAL PLANS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	192	16	26	47	14	38	13	13	25
PURCHASED THROUGH A COMMERCIAL INSURANCE COMPANY	54.7%	56.3%	50.0%	57.4%	50.0%	57.9%	61.5%	38.5%	56.0%
A COMBINATION OF BOTH	23.4	37.5	38.5	19.1	14.3	21.1	7.7	15.4	28.0
SELF-FUNDED MEDICAL PLAN	21.9	6.3	11.5	23.4	35.7	21.1	30.8	46.2	16.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 118A
TYPES OF ALTERNATIVE HEALTH-CARE SYSTEMS OR MANAGED CARE PROGRAMS CURRENTLY IN USE

	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	RETAIL STORE COUNT 1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	210	16	194	65	79	22	33
PERCENTAGE WITH:							
SECOND SURGICAL OPINION	66.2%	81.3%	64.9%	49.2%	72.2%	63.6%	87.9%
PREADMISSION TESTING	53.3	68.8	52.1	38.5	51.9	68.2	72.7
PRECERTIFICATION OF INPATIENT DAYS	47.1	50.0	46.9	27.7	49.4	63.6	72.7
NON-SURGICAL OUTPATIENT CARE	44.8	43.8	44.8	29.2	46.8	50.0	66.7
SURGICAL OUTPATIENT CARE	42.4	50.0	41.8	26.2	40.5	54.5	78.8
HOSPITAL BILL AUDIT	28.1	37.5	27.3	12.3	24.1	45.5	57.6
PREFERRED PROVIDER ORGANIZATION	24.8	31.3	24.2	7.7	24.1	40.9	51.5
HEALTH MAINTENANCE ORGANIZATION	21.9	37.5	20.6	7.7	20.3	18.2	57.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 118B

TYPES OF ALTERNATIVE HEALTH-CARE SYSTEMS OR MANAGED CARE PROGRAMS CURRENTLY IN USE

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS							
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	210	16	29	51	17	40	14	13	30
PERCENTAGE WITH:									
SECOND SURGICAL OPINION	66.2%	62.5%	62.1%	70.6%	58.8%	67.5%	78.6%	92.3%	50.0%
PREADMISSION TESTING	53.3	43.8	55.2	49.0	41.2	67.5	71.4	61.5	40.0
PRECERTIFICATION OF INPATIENT DAYS	47.1	31.3	34.5	49.0	52.9	57.5	78.6	38.5	36.7
NON-SURGICAL OUTPATIENT CARE	44.8	31.3	48.3	39.2	41.2	50.0	78.6	53.8	33.3
SURGICAL OUTPATIENT CARE	42.4	25.0	41.4	39.2	52.9	50.0	57.1	61.5	26.7
HOSPITAL BILL AUDIT	28.1	6.3	20.7	25.5	23.5	30.0	64.3	46.2	26.7
PREFERRED PROVIDER ORGANIZATION	24.8	25.0	10.3	17.6	35.3	20.0	50.0	30.8	36.7
HEALTH MAINTENANCE ORGANIZATION	21.9	43.8	34.5	17.6	17.6	5.0	14.3	30.8	30.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 119A

AVERAGE MEDICAL CLAIMS COST PER HOURLY EMPLOYEE AND AVERAGE COST INCREASES IN MEDICAL PREMIUMS

				RETAIL STORE COUNT			
	ALL COMPANIES	ALL WHOLESALERS	ALL RETAILERS	1 STORE	2 - 10 STORES	11 - 49 STORES	50 + STORES
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	210	16	194	65	79	22	33
AVERAGE MEDICAL CLAIMS COST PER EMPLOYEE IN 1987	$1231	$2198	$1119	$1650	$802	$1774	$1101
AVERAGE MEDICAL CLAIMS COST PER EMPLOYEE IN 1988	$1178	$2353	$1031	$999	$814	$1642	$1284
AVERAGE MEDICAL CLAIMS COST PER EMPLOYEE IN 1989	$1226	$2596	$1059	$900	$858	$1794	$1352
AVERAGE PERCENTAGE INCREASE IN MEDICAL PLAN PREMIUMS: 1987 OVER 1986	15.2	15.5	15.1	16.2	14.0	16.5	15.5
AVERAGE PERCENTAGE INCREASE IN MEDICAL PLAN PREMIUMS: 1988 OVER 1987	20.3	20.5	20.2	24.4	18.4	24.6	16.3
AVERAGE PERCENTAGE INCREASE IN MEDICAL PLAN PREMIUMS: 1989 OVER 1988	24.0	21.0	24.3	24.2	22.6	25.5	25.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 119B

AVERAGE MEDICAL CLAIMS COST PER HOURLY EMPLOYEE AND AVERAGE COST INCREASES IN MEDICAL PREMIUMS

		GEOGRAPHIC REGION OF HEADQUARTERS							
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC
TOTAL COMPANIES THAT PROVIDE PLAN COVERAGE FOR HOURLY EMPLOYEES	210	16	29	51	17	40	14	13	30
AVERAGE MEDICAL CLAIMS COST PER EMPLOYEE IN 1987	$1231	$469	$1553	$1309	$1378	$1344	$1406	$884	$75
AVERAGE MEDICAL CLAIMS COST PER EMPLOYEE IN 1988	$1178	$532	$1646	$1298	$1282	$986	$1665	$925	$280
AVERAGE MEDICAL CLAIMS COST PER EMPLOYEE IN 1989	$1226	$675	$1846	$1182	$1322	$1221	$1497	$974	$100
AVERAGE PERCENTAGE INCREASE IN MEDICAL PLAN PREMIUMS: 1987 OVER 1986	15.2	14.6	16.8	14.5	17.9	18.7	14.4	10.8	8.5
AVERAGE PERCENTAGE INCREASE IN MEDICAL PLAN PREMIUMS: 1988 OVER 1987	20.3	21.5	18.7	26.3	18.8	15.5	23.6	13.2	18.0
AVERAGE PERCENTAGE INCREASE IN MEDICAL PLAN PREMIUMS: 1989 OVER 1988	24.0	28.9	20.9	28.8	17.3	24.8	21.9	15.1	29.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 120A
PROFILE OF RESPONDENTS -- NUMBER OF STORES OPERATED AND ANNUAL SALES

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	175	40	53	25	26	7	10	8	6
1 STORE OPERATORS	33.1%	97.5%	34.0%	4.0%	-	-	-	-	-
2 - 10 STORE COMPANIES	34.9	2.5	58.5	76.0	38.5	-	-	-	-
11 - 49 COMPANIES	17.7	-	3.8	20.0	57.7	85.7	20.0	12.5	-
50 + STORE COMPANIES	14.3	-	3.8	-	3.8	14.3	80.0	87.5	100.0
INDEPENDENTS (1 - 10 STORES)	68.0	100.0	92.5	80.0	38.5	-	-	-	-
CHAINS (11+ STORES)	32.0	-	7.5	20.0	61.5	100.0	100.0	100.0	100.0

TABLE 120B
PROFILE OF RESPONDENTS -- ANNUAL SALES AND GEOGRAPHIC REGION

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	175	12	29	45	15	21	12	9	31	1
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)										
UNDER $10	22.9%	25.0%	17.2%	31.1%	26.7%	33.3%	-	44.4%	9.7%	
$10 - $30	30.3	33.3	31.0	24.4	13.3	19.0	41.7	11.1	51.6	
$31 - $100	14.3	25.0	10.3	8.9	-	19.0	33.3	22.2	16.1	
$101 - $250	14.9	8.3	17.2	24.4	20.0	9.5	8.3	11.1	6.5	
$251 - $500	4.0	-	3.4	2.2	20.0	-	8.3	-	3.2	
$501 - $1 BILLION	5.7	-	6.9	2.2	13.3	9.5	-	11.1	6.5	
$1 BILLION - $3 BILLION	4.6	8.3	13.8	-	6.7	4.8	8.3	-	-	
OVER $3 BILLION	3.4	-	-	6.7	-	4.8	-	-	6.5	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 121A
PERCENTAGE OF STORES FEATURING SEAFOOD

	ALL STORES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	6660	41	1104	200	507	188	668	731	3221
STORES FEATURING FRESH SEAFOOD	69.2%	63.4%	93.1%	77.5%	61.5%	78.2%	63.8%	97.9%	55.8%
STORES FEATURING FROZEN SEAFOOD *	91.7	85.4	92.8	68.5	68.0	100.0	70.7	93.6	100.0
STORES FEATURING OTHER SEAFOOD **	75.6	61.0	95.4	28.5	42.2	57.4	43.0	60.1	88.5
FULL-SERVICE SEAFOOD	47.5	34.1	43.8	57.0	33.9	66.5	48.7	44.7	49.8
SELF-SERVICE SEAFOOD	75.9	48.8	94.4	50.0	47.9	53.2	44.5	53.2	88.9

TABLE 121B
PERCENTAGE OF STORES FEATURING SEAFOOD

	ALL STORES	NUMBER OF STORES OPERATED					
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL STORES	6660	58	282	677	5643	340	6320
STORES FEATURING FRESH SEAFOOD	69.2%	75.9%	83.3%	75.9%	67.6%	82.1%	68.5%
STORES FEATURING FROZEN SEAFOOD *	91.7	86.2	79.4	74.9	94.4	80.6	92.3
STORES FEATURING OTHER SEAFOOD **	75.6	58.6	51.4	50.1	80.0	52.6	76.8
FULL-SERVICE SEAFOOD	47.5	46.6	47.9	54.7	46.6	47.6	47.5
SELF-SERVICE SEAFOOD	75.9	51.7	58.5	36.8	81.7	57.4	76.9

* FROZEN FISH EXCLUDES BRANDED, PACKAGED FROZEN FOODS

** OTHER CANNED, DRIED, CURED, ETC.

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 121C
PERCENTAGE OF STORES FEATURING SEAFOOD

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	6660	115	558	1830	307	1635	327	220	1665	3
STORES FEATURING FRESH SEAFOOD	69.2%	99.1%	81.7%	55.4%	64.5%	48.5%	78.0%	49.5%	99.9%	
STORES FEATURING FROZEN SEAFOOD *	91.7	98.3	86.7	98.3	83.4	92.8	70.9	45.0	96.3	
STORES FEATURING OTHER SEAFOOD **	75.6	90.4	40.7	79.5	39.7	87.7	85.0	35.9	80.0	
FULL-SERVICE SEAFOOD	47.5	71.3	40.1	50.5	61.6	41.8	37.6	25.0	53.0	
SELF-SERVICE SEAFOOD	75.9	27.8	41.9	88.5	33.9	89.4	63.6	65.0	75.1	

* FROZEN FISH EXCLUDES BRANDED, PACKAGED FROZEN FOODS

** OTHER CANNED, DRIED, CURED, ETC.

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 122A
PERCENTAGE OF STORES WITH A SEPARATE SEAFOOD DEPARTMENT

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	6660	41	1104	200	507	188	668	731	3221
PERCENTAGE WITH A SEPARATE SEAFOOD DEPARTMENT IN 1989	40.6%	26.8%	42.8%	45.5%	19.3%	26.1%	39.4%	35.4%	45.3%
PERCENTAGE EXPECTING TO HAVE ONE IN 1991	52.8	36.6	52.8	60.0	37.1	39.9	54.6	33.2	59.8

TABLE 122B
PERCENTAGE OF STORES WITH A SEPARATE SEAFOOD DEPARTMENT

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL STORES	6660	58	282	677	5643	340	6320
PERCENTAGE WITH A SEPARATE SEAFOOD DEPARTMENT IN 1989	40.6%	37.9%	36.2%	40.5%	40.9%	36.5%	40.8%
PERCENTAGE EXPECTING TO HAVE ONE IN 1991	52.8	46.6	55.3	61.7	51.6	53.8	52.7

TABLE 122C
PERCENTAGE OF STORES WITH A SEPARATE SEAFOOD DEPARTMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	6660	115	558	1830	307	1635	327	220	1665	3
PERCENTAGE WITH A SEPARATE SEAFOOD DEPARTMENT IN 1989	40.6%	43.5%	34.1%	44.8%	42.3%	41.0%	27.2%	.9%	45.2%	
PERCENTAGE EXPECTING TO HAVE ONE IN 1991	52.8	21.7	48.4	52.5	38.8	53.0	41.0	4.1	67.9	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 123A
PERCENTAGE OF SUPERMARKETS IN WHICH THE FOLLOWING DEPARTMENTS RECEIVE CREDIT FOR SEAFOOD ITEMS

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	6660	41	1104	200	507	188	668	731	3221
SEAFOOD DEPARTMENT	42.2%	34.1%	43.4%	33.0%	28.0%	26.1%	40.3%	54.7%	43.2%
MEAT DEPARTMENT	71.4	70.7	57.0	46.5	59.8	77.7	30.7	37.3	95.5
DELI DEPARTMENT	4.2	19.5	1.9	25.0	5.3	-	.7	18.9	1.0
OTHER DEPARTMENT	19.2	17.1	1.6	3.0	4.9	-	-	-	38.0

TABLE 123B
PERCENTAGE OF SUPERMARKETS IN WHICH THE FOLLOWING DEPARTMENTS RECEIVE CREDIT FOR SEAFOOD ITEMS

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL STORES	6660	58	282	677	5643	340	6320
SEAFOOD DEPARTMENT	42.2%	44.8%	44.3%	40.2%	42.3%	44.4%	42.1%
MEAT DEPARTMENT	71.4	60.3	58.5	53.0	74.4	58.8	72.1
DELI DEPARTMENT	4.2	24.1	8.9	10.6	3.0	11.5	3.8
OTHER DEPARTMENT	19.2	17.2	9.2	3.0	21.7	10.6	19.7

TABLE 123C
PERCENTAGE OF SUPERMARKETS IN WHICH THE FOLLOWING DEPARTMENTS RECEIVE CREDIT FOR SEAFOOD ITEMS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	6660	115	558	1830	307	1635	327	220	1665	3
SEAFOOD DEPARTMENT	42.2%	60.9%	46.6%	46.8%	27.0%	41.5%	56.6%	4.1%	40.1%	
MEAT DEPARTMENT	71.4	32.2	44.6	89.7	38.4	88.6	30.0	65.9	61.0	
DELI DEPARTMENT	4.2	6.1	5.9	2.2	16.3	5.7	14.4	-	.7	
OTHER DEPARTMENT	19.2	-	3.8	.7	1.0	75.1	1.8	-	.5	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 124

MEDIAN OF THE AVERAGE WEEKLY SALES PER WEEK PER STORE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$4500	$2700	$4850	5108
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1000	$500	2100	32
$10 - $30	4500	4500	4500	1085
$31 - $100	3400	1100	4096	194
$101 - $250	2000	$300	4400	507
$251 - $500	3500	1500	6676	141
$501 - $1 BILLION	3100	3000	4808	668
$1 BILLION - $3 BILLION	3000	2000	9400	654
OVER $3 BILLION	4850	3000	4900	1827
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	2500	1100	8500	37
MID-ATLANTIC	6500	3000	10000	537
EAST NORTH CENTRAL	4850	3000	4975	1816
WEST NORTH CENTRAL	3500	3500	4808	294
SOUTH CENTRAL	3100	1000	4500	407
WEST SOUTH CENTRAL	2000	1100	2000	302
MOUNTAIN	$300	$300	3000	220
PACIFIC	4400	4000	4800	1492
CANADA				3
NUMBER OF STORES				
1 STORE	1550	1000	4150	46
2-10 STORES	3000	2000	4058	260
11-49 STORES	4500	2000	6676	630
50+ STORES	4500	2900	4850	4172
INDEPENDENTS (1 - 10 STORES)	3000	1500	4058	306
CHAINS (11+ STORES)	4500	2700	4850	4802

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 125
MEDIAN GROSS MARGIN FOR TOTAL SEAFOOD SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	25.0%	25.0%	31.0%	3867
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	30.0	25.0	34.0	29
$10 - $30	30.0	27.0	30.0	129
$31 - $100	30.0	25.0	35.0	167
$101 - $250	25.0	20.0	30.0	282
$251 - $500	25.0	2.0	32.0	141
$501 - $1 BILLION	29.0	28.0	31.0	668
$1 BILLION - $3 BILLION	27.0	24.0	31.0	654
OVER $3 BILLION	25.0	25.0	32.0	1797
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	15.0	0	25.0	21
MID-ATLANTIC	30.0	24.0	30.0	531
EAST NORTH CENTRAL	25.0	25.0	25.0	1582
WEST NORTH CENTRAL	28.0	25.0	28.0	275
SOUTH CENTRAL	27.0	27.0	29.0	388
WEST SOUTH CENTRAL	31.0	31.0	31.0	250
MOUNTAIN	35.0	35.0	35.0	65
PACIFIC	32.0	30.0	35.0	752
CANADA				3
NUMBER OF STORES				
1 STORE	30.0	28.0	35.0	46
2-10 STORES	27.0	24.0	30.0	209
11-49 STORES	30.0	23.0	32.0	573
50+ STORES	25.0	25.0	31.0	3039
INDEPENDENTS (1 - 10 STORES)	28.0	25.0	30.0	255
CHAINS (11+ STORES)	25.0	25.0	31.0	3612

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 126
MEDIAN GROSS MARGIN FOR FRESH SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	30.0%	28.0%	35.0%	2418
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	33.5	30.0	35.0	14
$10 - $30	35.0	30.0	35.0	85
$31 - $100	25.0	20.0	32.0	64
$101 - $250	25.0	25.0	35.0	234
$251 - $500	35.0	35.0	45.0	128
$501 - $1 BILLION	30.0	28.0	35.0	358
$1 BILLION - $3 BILLION	30.0	25.0	35.0	504
OVER $3 BILLION	28.0	28.0	35.0	1031
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	20.0	20.0	37.0	15
MID-ATLANTIC	30.0	25.0	35.0	290
EAST NORTH CENTRAL	28.0	28.0	28.0	960
WEST NORTH CENTRAL	26.0	25.0	35.0	190
SOUTH CENTRAL	30.0	30.0	35.0	212
WEST SOUTH CENTRAL	35.0	35.0	35.0	208
MOUNTAIN	35.0	35.0	35.0	57
PACIFIC	35.0	35.0	35.0	483
CANADA				3
NUMBER OF STORES				
1 STORE	33.0	30.0	35.0	23
2-10 STORES	27.0	25.0	35.0	132
11-49 STORES	32.0	25.0	35.0	435
50+ STORES	30.0	28.0	35.0	1828
INDEPENDENTS (1 - 10 STORES)	28.0	25.0	35.0	155
CHAINS (11+ STORES)	30.0	28.0	35.0	2263

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 127
MEDIAN GROSS MARGIN FOR FROZEN SEAFOOD *

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	28.0%	23.0%	35.0%	3045
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	29.0	25.0	33.0	22
$10 - $30	30.0	25.0	30.0	90
$31 - $100	30.0	22.0	30.0	69
$101 - $250	30.0	20.0	30.0	220
$251 - $500	28.0	1.0	32.0	141
$501 - $1 BILLION	31.0	30.0	35.0	404
$1 BILLION - $3 BILLION	35.0	30.0	35.0	472
OVER $3 BILLION	23.0	23.0	23.0	1627
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND				2
MID-ATLANTIC	30.0	28.0	30.0	286
EAST NORTH CENTRAL	23.0	23.0	23.0	1556
WEST NORTH CENTRAL	31.0	30.0	35.0	243
SOUTH CENTRAL	30.0	25.0	30.0	258
WEST SOUTH CENTRAL	35.0	35.0	35.0	205
MOUNTAIN	35.0	35.0	35.0	57
PACIFIC	35.0	35.0	35.0	435
CANADA				3
NUMBER OF STORES				
1 STORE	30.0	25.0	35.0	30
2-10 STORES	30.0	25.0	30.0	119
11-49 STORES	30.0	20.0	35.0	385
50+ STORES	28.0	23.0	35.0	2511
INDEPENDENTS (1 - 10 STORES)	30.0	25.0	30.0	149
CHAINS (11+ STORES)	28.0	23.0	35.0	2896

* FROZEN FISH EXCLUDES BRANDED, PACKAGED FOODS

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH FROZEN SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 128
MEDIAN GROSS MARGIN FOR SELF-SERVICE SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	26.0%	26.0%	27.0%	2111
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	32.5	25.0	36.0	10
$10 - $30	26.0	24.0	27.0	51
$31 - $100	25.0	25.0	35.0	38
$101 - $250	25.0	2.0	27.0	120
$251 - $500	30.0	30.0	30.0	66
$501 - $1 BILLION	28.0	23.0	30.0	297
$1 BILLION - $3 BILLION	35.0	30.0	35.0	175
OVER $3 BILLION	26.0	26.0	26.0	1354
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND				1
MID-ATLANTIC	25.0	23.0	30.0	99
EAST NORTH CENTRAL	26.0	26.0	26.0	1399
WEST NORTH CENTRAL	25.0	25.0	25.0	70
SOUTH CENTRAL	28.0	2.0	28.0	117
WEST SOUTH CENTRAL	35.0	35.0	35.0	134
MOUNTAIN	35.0	35.0	35.0	56
PACIFIC	28.0	22.0	28.0	235
CANADA				0
NUMBER OF STORES				
1 STORE	30.0	25.0	35.0	14
2-10 STORES	26.0	25.0	30.0	79
11-49 STORES	25.0	20.0	30.0	161
50+ STORES	26.0	26.0	26.0	1857
INDEPENDENTS (1 - 10 STORES)	27.0	25.0	30.0	93
CHAINS (11+ STORES)	26.0	26.0	26.0	2018

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH SELF-SERVICE SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 129
MEDIAN GROSS MARGIN FOR FULL-SERVICE SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	25.0%	24.0%	35.0%	1763
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	37.5	32.0	40.0	6
$10 - $30	30.0	30.0	32.0	48
$31 - $100	27.0	25.0	30.0	27
$101 - $250	27.0	20.0	38.0	110
$251 - $500	35.0	35.0	40.0	112
$501 - $1 BILLION	30.0	28.0	33.0	325
$1 BILLION - $3 BILLION	25.0	25.0	30.0	211
OVER $3 BILLION	24.0	24.0	37.0	924
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	32.0	20.0	37.0	18
MID-ATLANTIC	30.0	25.0	31.0	118
EAST NORTH CENTRAL	24.0	24.0	24.0	847
WEST NORTH CENTRAL	28.0	25.0	28.0	179
SOUTH CENTRAL	29.0	27.0	33.0	109
WEST SOUTH CENTRAL	35.0	27.0	35.0	80
MOUNTAIN	35.0	35.0	35.0	45
PACIFIC	37.0	30.0	37.0	367
CANADA				0
NUMBER OF STORES				
1 STORE	32.5	27.5	35.0	12
2-10 STORES	30.0	25.0	32.0	71
11-49 STORES	30.0	25.0	40.0	234
50+ STORES	25.0	24.0	35.0	1446
INDEPENDENTS (1 - 10 STORES)	30.0	25.0	33.0	83
CHAINS (11+ STORES)	25.0	24.0	35.0	1680

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH FULL-SERVICE SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 130
MEDIAN LINEAR FEET OF CASES DEVOTED TO FRESH SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	16.0	12.0	16.0	4440
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	8.0	4.0	12.0	24
$10 - $30	16.0	16.0	16.0	1019
$31 - $100	12.0	8.0	16.0	144
$101 - $250	12.0	8.0	16.0	309
$251 - $500	12.0	12.0	12.0	141
$501 - $1 BILLION	12.0	12.0	16.0	426
$1 BILLION - $3 BILLION	12.0	8.0	20.0	581
OVER $3 BILLION	16.0	16.0	16.0	1796
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	20.0	12.0	20.0	114
MID-ATLANTIC	16.0	12.0	24.0	321
EAST NORTH CENTRAL	16.0	12.0	16.0	1011
WEST NORTH CENTRAL	16.0	12.0	20.0	191
SOUTH CENTRAL	16.0	12.0	16.0	789
WEST SOUTH CENTRAL	8.0	8.0	8.0	253
MOUNTAIN	12.0	3.0	12.0	109
PACIFIC	16.0	16.0	16.0	1649
CANADA				3
NUMBER OF STORES				
1 STORE	10.0	4.0	12.0	42
2-10 STORES	12.0	6.0	14.0	214
11-49 STORES	12.0	12.0	16.0	506
50+ STORES	16.0	16.0	16.0	3678
INDEPENDENTS (1 - 10 STORES)	12.0	6.0	14.0	256
CHAINS (11+ STORES)	16.0	12.0	16.0	4184

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 131
MEDIAN LINEAR FEET OF CASES DEVOTED TO FROZEN SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	8.0	8.0	18.0	5956
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	8.0	4.0	20.0	30
$10 - $30	8.0	8.0	8.0	1016
$31 - $100	4.0	0	8.0	137
$101 - $250	8.0	4.0	15.0	285
$251 - $500	24.0	20.0	50.0	188
$501 - $1 BILLION	8.0	8.0	20.0	472
$1 BILLION - $3 BILLION	10.0	8.0	10.0	607
OVER $3 BILLION	8.0	8.0	18.0	3221
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	0	0	4.5	36
MID-ATLANTIC	9.0	6.0	16.0	463
EAST NORTH CENTRAL	18.0	18.0	18.0	1796
WEST NORTH CENTRAL	24.0	8.0	48.0	255
SOUTH CENTRAL	8.0	8.0	8.0	1475
WEST SOUTH CENTRAL	10.0	10.0	10.0	230
MOUNTAIN	12.0	4.0	12.0	98
PACIFIC	8.0	8.0	8.0	1600
CANADA				3
NUMBER OF STORES				
1 STORE	8.0	4.0	18.0	44
2-10 STORES	8.0	0	12.0	217
11-49 STORES	12.0	4.0	20.0	447
50+ STORES	8.0	8.0	18.0	5248
INDEPENDENTS (1 - 10 STORES)	8.0	2.0	12.0	261
CHAINS (11+ STORES)	8.0	8.0	18.0	5695

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH FROZEN SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 132
MEDIAN LINEAR FEET OF CASES DEVOTED TO OTHER SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	4.0	1.0	4.0	2586
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	12.0	4.0	20.0	11
$10 - $30	1.0	1.0	1.0	968
$31 - $100	30.0	10.0	40.0	19
$101 - $250	8.0	3.0	8.0	135
$251 - $500	8.0	4.0	8.0	58
$501 - $1 BILLION	4.0	4.0	6.0	90
$1 BILLION - $3 BILLION	2.0	2.0	2.0	10
OVER $3 BILLION	4.0	4.0	4.0	1297
GEOGRAPHIC RECION OF HEADQUARTERS				
NEW ENGLAND	30.0	11.5	30.0	8
MID-ATLANTIC	6.0	6.0	8.0	89
EAST NORTH CENTRAL	4.0	4.0	4.0	1378
WEST NORTH CENTRAL	12.0	8.0	12.0	29
SOUTH CENTRAL	4.0	4.0	4.0	53
WEST SOUTH CENTRAL	5.5	3.0	8.0	40
MOUNTAIN				1
PACIFIC	1.0	1.0	1.0	990
CANADA				0
NUMBER OF STORES				
1 STORE	12.0	4.0	18.0	16
2-10 STORES	12.0	8.0	16.0	83
11-49 STORES	6.0	3.0	8.0	234
50+ STORES	4.0	1.0	4.0	2255
INDEPENDENTS (1 - 10 STORES)	12.0	8.0	16.0	99
CHAINS (11+ STORES)	4.0	1.0	4.0	2489

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH OTHER SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 133
MEDIAN LINEAR FEET OF CASES DEVOTED TO SELF-SERVICE SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	12.0	6.0	18.0	3405
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	10.0	8.0	20.0	8
$10 - $30	6.0	6.0	6.0	968
$31 - $100	6.0	4.0	10.0	66
$101 - $250	6.0	4.0	16.0	158
$251 - $500	8.0	8.0	24.0	96
$501 - $1 BILLION	12.0	8.0	12.0	297
$1 BILLION - $3 BILLION	7.0	4.0	8.0	389
OVER $3 BILLION	18.0	18.0	18.0	1423
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	4.0	4.0	4.0	30
MID-ATLANTIC	7.0	7.0	8.0	224
EAST NORTH CENTRAL	18.0	18.0	18.0	1392
WEST NORTH CENTRAL	4.0	4.0	24.0	96
SOUTH CENTRAL	8.0	8.0	12.0	225
WEST SOUTH CENTRAL	4.0	4.0	4.0	134
MOUNTAIN	12.0	12.0	12.0	63
PACIFIC	6.0	6.0	7.0	1241
CANADA				0
NUMBER OF STORES				
1 STORE	12.0	8.0	20.0	16
2-10 STORES	6.0	4.0	10.0	129
11-49 STORES	10.0	4.0	16.0	220
50+ STORES	12.0	6.0	18.0	3040
INDEPENDENTS (1 - 10 STORES)	7.5	4.0	12.0	145
CHAINS (11+ STORES)	12.0	6.0	18.0	3260

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH SELF-SERVICE SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 134
MEDIAN LINEAR FEET OF CASES DEVOTED TO FULL-SERVICE SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	16.0	12.0	16.0	2990
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	12.0	8.0	12.0	9
$10 - $30	16.0	16.0	16.0	476
$31 - $100	12.0	8.0	12.0	50
$101 - $250	12.0	8.0	16.0	163
$251 - $500	12.0	12.0	12.0	110
$501 - $1 BILLION	14.0	12.0	16.0	325
$1 BILLION - $3 BILLION	20.0	20.0	28.0	327
OVER $3 BILLION	16.0	16.0	16.0	1530
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	28.0	12.0	28.0	81
MID-ATLANTIC	20.0	20.0	24.0	221
EAST NORTH CENTRAL	16.0	16.0	16.0	840
WEST NORTH CENTRAL	16.0	12.0	20.0	180
SOUTH CENTRAL	16.0	16.0	16.0	666
WEST SOUTH CENTRAL	16.0	16.0	16.0	66
MOUNTAIN	12.0	12.0	12.0	54
PACIFIC	16.0	16.0	16.0	882
CANADA				0
NUMBER OF STORES				
1 STORE	12.0	8.0	12.0	17
2-10 STORES	12.0	8.0	16.0	123
11-49 STORES	16.0	12.0	20.0	291
50+ STORES	16.0	16.0	16.0	2559
INDEPENDENTS (1 - 10 STORES)	12.0	8.0	16.0	140
CHAINS (11+ STORES)	16.0	16.0	16.0	2850

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH FULL-SERVICE SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 135A

MEDIAN NUMBER OF FULL-TIME EMPLOYEES PER STORE DEVOTED EXCLUSIVELY TO SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	2	1	2	6566
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	0	0	1	33
$10 - $30	3	3	3	1044
$31 - $100	0	0	2	194
$101 - $250	1	1	1	487
$251 - $500	1	1	2	188
$501 - $1 BILLION	2	1	2	668
$1 BILLION - $3 BILLION	2	2	3	731
OVER $3 BILLION	1	1	2	3221
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	2	0	2	115
MID-ATLANTIC	2	1	2	557
EAST NORTH CENTRAL	2	1	2	1821
WEST NORTH CENTRAL	1	1	1	306
SOUTH CENTRAL	1	1	1	1613
WEST SOUTH CENTRAL	3	0	3	266
MOUNTAIN	1	1	1	220
PACIFIC	3	2	3	1665
CANADA				3
NUMBER OF STORES				
1 STORE	1	0	1	50
2-10 STORES	1	0	2	269
11-49 STORES	1	1	2	657
50+ STORES	2	1	2	5590
INDEPENDENTS (1 - 10 STORES)	1	0	2	319
CHAINS (11+ STORES)	2	1	2	6247

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 135B
PERCENTAGE OF FULL-TIME EMPLOYEES PER STORE DEVOTED EXCLUSIVELY TO SEAFOOD

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
ALL COMPANIES	160	32	48	24	25	7	10	8	6
0 PEOPLE	30.6%	59.4%	35.4%	33.3%	16.0%	14.3%	-	-	-
1 PERSON	35.0	31.3	31.3	25.0	52.0	42.9	40.0	12.5	66.7
2 PEOPLE	23.8	6.3	22.9	16.7	24.0	28.6	60.0	62.5	33.3
3 PEOPLE	6.9	3.1	8.3	12.5	4.0	-	-	25.0	-
4 OR MORE PEOPLE	3.8	-	2.1	12.5	4.0	14.3	-	-	-

TABLE 135C
PERCENTAGE OF FULL-TIME EMPLOYEES PER STORE DEVOTED EXCLUSIVELY TO SEAFOOD

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
ALL COMPANIES	160	50	56	30	24	106	54
0 PEOPLE	30.6%	48.0%	33.9%	20.0%	-	40.6%	11.1%
1 PERSON	35.0	32.0	33.9	33.3	45.8	33.0	38.9
2 PEOPLE	23.8	14.0	19.6	30.0	45.8	17.0	37.0
3 PEOPLE	6.9	4.0	5.4	13.3	8.3	4.7	11.1
4 OR MORE PEOPLE	3.8	2.0	7.1	3.3	-	4.7	1.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 136A

MEDIAN NUMBER OF PART-TIME EMPLOYEES PER STORE DEVOTED EXCLUSIVELY TO SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	3	2	3	6566
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	0	0	1	33
$10 - $30	3	3	3	1044
$31 - $100	0	0	2	194
$101 - $250	1	1	2	487
$251 - $500	0	0	3	188
$501 - $1 BILLION	2	1	3	668
$1 BILLION - $3 BILLION	2	2	3	731
OVER $3 BILLION	3	3	3	3221
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	3	2	3	115
MID-ATLANTIC	3	3	4	557
EAST NORTH CENTRAL	3	2	3	1821
WEST NORTH CENTRAL	2	2	3	306
SOUTH CENTRAL	3	3	3	1613
WEST SOUTH CENTRAL	2	0	2	266
MOUNTAIN	1	1	1	220
PACIFIC	3	1	3	1665
CANADA				3
NUMBER OF STORES				
1 STORE	1	0	2	50
2-10 STORES	1	0	2	269
11-49 STORES	2	0	3	657
50+ STORES	3	2	3	5590
INDEPENDENTS (1 - 10 STORES)	1	0	2	319
CHAINS (11+ STORES)	3	2	3	6247

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 136B
PERCENTAGE OF PART-TIME EMPLOYEES PER STORE DEVOTED EXCLUSIVELY TO SEAFOOD

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
ALL STORES	6566	33	1044	194	487	188	668	731	3221
0 PEOPLE	.9%	48.5%	2.3%	4.6%	1.6%	2.1%	-	-	-
1 PERSON	.5	24.2	.8	2.1	1.2	-	.4	-	-
2 PEOPLE	.5	18.2	.9	3.1	.8	.5	.4	.5	.1
3 PEOPLE	.4	3.0	.7	2.1	.6	.5	.3	.4	.1
4 OR MORE PEOPLE	.2	3.0	.1	.5	.8	.5	.3	.1	-

TABLE 136C
PERCENTAGE OF PART-TIME EMPLOYEES PER STORE DEVOTED EXCLUSIVELY TO SEAFOOD

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
ALL STORES	6566	50	269	657	5590	319	6247
0 PEOPLE	.9%	44.0%	10.0%	1.7%	-	15.4%	.2%
1 PERSON	.5	24.0	3.7	.6	.1	6.9	.1
2 PEOPLE	.5	16.0	4.5	.9	.2	6.3	.3
3 PEOPLE	.4	12.0	1.9	.9	.1	3.4	.2
4 OR MORE PEOPLE	.2	4.0	1.1	.5	.1	1.6	.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 137

MEDIAN NUMBER OF EMPLOYEES SHARED WITH ANOTHER DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	1	0	1	6566
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	0	0	1	33
$10 - $30	1	1	1	1044
$31 - $100	0	0	2	194
$101 - $250	0	0	1	487
$251 - $500	0	0	1	188
$501 - $1 BILLION	0	0	1	668
$1 BILLION - $3 BILLION	1	0	1	731
OVER $3 BILLION	0	0	1	3221
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	1	1	1	115
MID-ATLANTIC	0	0	1	557
EAST NORTH CENTRAL	1	1	1	1821
WEST NORTH CENTRAL	1	0	2	306
SOUTH CENTRAL	0	0	0	1613
WEST SOUTH CENTRAL	1	1	1	266
MOUNTAIN	0	0	0	220
PACIFIC	1	0	1	1665
CANADA				3
NUMBER OF STORES				
1 STORE	0	0	2	50
2-10 STORES	0	0	1	269
11-49 STORES	0	0	2	657
50+ STORES	1	0	1	5590
INDEPENDENTS (1 - 10 STORES)	0	0	1	319
CHAINS (11+ STORES)	1	0	1	6247

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 138
MEDIAN NUMBER OF FULL-TIME EQUIVALENTS DEVOTED EXCLUSIVELY TO SEAFOOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	0	0	2	6566
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	0	0	0	33
$10 - $30	0	0	0	1044
$31 - $100	0	0	0	194
$101 - $250	0	0	0	487
$251 - $500	0	0	0	188
$501 - $1 BILLION	0	0	0	668
$1 BILLION - $3 BILLION	0	0	3	731
OVER $3 BILLION	0	0	3	3221
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	0	0	0	115
MID-ATLANTIC	0	0	0	557
EAST NORTH CENTRAL	3	0	3	1821
WEST NORTH CENTRAL	0	0	0	306
SOUTH CENTRAL	0	0	0	1613
WEST SOUTH CENTRAL	5	0	5	266
MOUNTAIN	0	0	0	220
PACIFIC	0	0	0	1665
CANADA				3
NUMBER OF STORES				
1 STORE	0	0	0	50
2-10 STORES	0	0	0	269
11-49 STORES	0	0	0	657
50+ STORES	0	0	3	5590
INDEPENDENTS (1 - 10 STORES)	0	0	0	319
CHAINS (11+ STORES)	0	0	3	6247

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 139A
PERCENTAGE OF COMPANIES OFFERING SPECIAL TRAINING TO EMPLOYEES HANDLING SEAFOOD

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	167	36	49	25	26	7	10	8	6
OFFERS SPECIAL TRAINING	71.3%	41.7%	67.3%	76.0%	88.5%	71.4%	100.0%	100.0%	100.0%
DOES NOT OFFER SPECIAL TRAINING	28.7	58.3	32.7	24.0	11.5	28.6	-	-	-

TABLE 139B
PERCENTAGE OF COMPANIES OFFERING SPECIAL TRAINING TO EMPLOYEES HANDLING SEAFOOD

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	167	54	57	31	25	111	56
OFFERS SPECIAL TRAINING	71.3%	50.0%	75.4%	83.9%	92.0%	63.1%	87.5%
DOES NOT OFFER SPECIAL TRAINING	28.7	50.0	24.6	16.1	8.0	36.9	12.5

TABLE 139C
PERCENTAGE OF COMPANIES OFFERING SPECIAL TRAINING TO EMPLOYEES HANDLING SEAFOOD

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	167	12	29	41	14	20	11	9	30	1
OFFERS SPECIAL TRAINING	71.3%	75.0%	82.8%	70.7%	57.1%	70.0%	72.7%	77.8%	66.7%	
DOES NOT OFFER SPECIAL TRAINING	28.7	25.0	17.2	29.3	42.9	30.0	27.3	22.2	33.3	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 140A

MEDIAN NUMBER OF TRAINING HOURS GIVEN NEW SEAFOOD EMPLOYEES PER YEAR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	20	12	40	100
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	35	15	53	8
$10 - $30	20	8	40	31
$31 - $100	20	8	24	15
$101 - $250	22	12	40	20
$251 - $500	40	12	80	5
$501 - $1 BILLION	30	20	40	9
$1 BILLION - $3 BILLION	50	20	160	7
OVER $3 BILLION	32	20	40	5
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	20	15	43	8
MID-ATLANTIC	20	16	40	21
EAST NORTH CENTRAL	22	12	40	26
WEST NORTH CENTRAL	70	48	80	6
SOUTH CENTRAL	20	10	40	11
WEST SOUTH CENTRAL	16	12	40	6
MOUNTAIN	16	10	20	5
PACIFIC	24	12	40	17
CANADA				0
NUMBER OF STORES				
1 STORE	20	12	43	20
2-10 STORES	20	12	40	38
11-49 STORES	22	12	40	22
50+ STORES	23	18	44	20
INDEPENDENTS (1 - 10 STORES)	20	12	40	58
CHAINS (11+ STORES)	22	12	40	42

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 140B
PERCENTAGE OF COMPANIES PROVIDING TRAINING FOR NEW SEAFOOD EMPLOYEES

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	100	8	31	15	20	5	9	7	5
1 - 9 HOURS	16.0%	12.5%	25.8%	26.7%	15.0%	-	-	-	-
10 - 19 HOURS	21.0	25.0	19.4	20.0	25.0	40.0	22.2	-	20.0
20 - 29 HOURS	22.0	-	19.4	40.0	20.0	-	22.2	42.9	20.0
30 - 39 HOURS	5.0	12.5	-	6.7	5.0	-	11.1	-	20.0
40 HOURS OR MORE	36.0	50.0	35.5	6.7	35.0	60.0	44.4	57.1	40.0

TABLE 140C
PERCENTAGE OF COMPANIES PROVIDING TRAINING FOR NEW SEAFOOD EMPLOYEES

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	100	20	38	22	20	58	42
1 - 9 HOURS	16.0%	15.0%	21.1%	18.2%	5.0	19.0%	11.9%
10 - 19 HOURS	21.0	25.0	15.8	27.3	20.0	19.0	23.8
20 - 29 HOURS	22.0	15.0	28.9	9.1	30.0	24.1	19.0
30 - 39 HOURS	5.0	5.0	2.6	9.1	5.0	3.4	7.1
40 HOURS OR MORE	36.0	40.0	31.6	36.4	40.0	34.5	38.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 141A
MEDIAN NUMBER OF TRAINING HOURS GIVEN EXPERIENCED SEAFOOD EMPLOYEES PER YEAR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	10	4	20	92
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	8	5	23	8
$10 - $30	8	2	16	30
$31 - $100	6	0	10	10
$101 - $250	12	4	30	21
$251 - $500	12	4	16	5
$501 - $1 BILLION	12	4	24	7
$1 BILLION - $3 BILLION	20	20	25	6
OVER $3 BILLION	16	10	24	5
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	10	4	20	7
MID-ATLANTIC	12	3	22	20
EAST NORTH CENTRAL	10	4	18	25
WEST NORTH CENTRAL	22	12	25	6
SOUTH CENTRAL	8	4	16	11
WEST SOUTH CENTRAL	4	0	12	5
MOUNTAIN	3	0	8	6
PACIFIC	9	6	18	12
CANADA				0
NUMBER OF STORES				
1 STORE	4	0	20	19
2-10 STORES	10	4	16	34
11-49 STORES	12	4	20	23
50+ STORES	20	8	24	16
INDEPENDENTS (1 - 10 STORES)	8	4	16	53
CHAINS (11+ STORES)	12	4	24	39

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 141B

PERCENTAGE OF COMPANIES PROVIDING TRAINING FOR EXPERIENCED SEAFOOD EMPLOYEES

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	92	8	30	10	21	5	7	6	5
0 - 9 HOURS	45.7%	62.5%	53.3%	70.0%	42.9%	40.0%	28.6%	-	20.0%
10 - 19 HOURS	26.1	-	30.0	20.0	28.6	40.0	28.6	16.7	40.0
20 - 29 HOURS	15.2	25.0	13.3	-	-	-	42.9	66.7	20.0
30 - 39 HOURS	3.3	12.5	-	10.0	4.8	-	-	-	-
40 HOURS OR MORE	9.8	-	3.3	-	23.8	20.0	-	16.7	20.0

TABLE 141C

PERCENTAGE OF COMPANIES PROVIDING TRAINING FOR EXPERIENCED SEAFOOD EMPLOYEES

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	92	19	34	23	16	53	39
0 - 9 HOURS	45.7%	68.4%	44.1%	43.5%	25.0%	52.8%	35.9%
10 - 19 HOURS	26.1	5.3	38.2	30.4	18.8	26.4	25.6
20 - 29 HOURS	15.2	15.8	8.8	4.3	43.8	11.3	20.5
30 - 39 HOURS	3.3	5.3	5.9	-	-	5.7	-
40 HOURS OR MORE	9.8	5.3	2.9	21.7	12.5	3.8	17.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 142A

PERCENTAGE OF COMPANIES PROVIDING THE FOLLOWING TYPES OF TRAINING

	ALL COMPANIES	ANNUAL SALES IN MILLIONS UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	119	15	33	19	23	5	10	8	6
SEMINARS	57.1%	40.0%	51.5%	31.6%	73.9%	80.0%	60.0%	100.0%	66.7%
VIDEOS	72.3	80.0	72.7	57.9	78.3	80.0	70.0	62.5	83.3
CERTIFICATION PROGRAMS	5.9	6.7	-	-	8.7	-	10.0	25.0	16.7
SELF-TRAINING MATERIALS	71.4	60.0	72.7	63.2	69.6	80.0	80.0	87.5	83.3
OTHER	34.5	20.0	30.3	42.1	34.8	40.0	30.0	62.5	33.3

TABLE 142B

PERCENTAGE OF COMPANIES PROVIDING THE FOLLOWING TYPES OF TRAINING

	ALL COMPANIES	NUMBER OF STORES OPERATED 1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	119	27	43	26	23	70	49
SEMINARS	57.1%	40.7%	51.2%	69.2%	73.9%	47.1%	71.4%
VIDEOS	72.3	66.7	74.4	73.1	73.9	71.4	73.5
CERTIFICATION PROGRAMS	5.9	3.7	2.3	3.8	17.4	2.9	10.2
SELF-TRAINING MATERIALS	71.4	70.4	60.5	76.9	87.0	64.3	81.6
OTHER	34.5	22.2	37.2	42.3	34.8	31.4	38.8

TABLE 142C

PERCENTAGE OF COMPANIES PROVIDING THE FOLLOWING TYPES OF TRAINING

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	119	9	24	29	8	14	8	7	20	0
SEMINARS	57.1%	44.4%	66.7%	58.6%	62.5%	57.1%	25.0%	57.1%	60.0%	
VIDEOS	72.3	44.4	87.5	79.3	75.0	85.7	50.0	42.9	65.0	
CERTIFICATION PROGRAMS	5.9	11.1	4.2	6.9	12.5	-	12.5	-	5.0	
SELF-TRAINING MATERIALS	71.4	44.4	83.3	65.5	87.5	85.7	50.0	71.4	70.0	
OTHER	34.5	44.4	20.8	48.3	37.5	28.6	37.5	14.3	35.0	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 143A
PERCENTAGE FOR CHANGE IN BUYING HABITS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
FINFISH	168	37	50	24	26	7	10	8	6
BUYING HABITS HAVE CHANGED	33.9%	16.2%	38.0%	20.8%	50.0%	28.6%	20.0%	75.0%	66.7%
BUYING HABITS HAVE NOT CHANGED	66.1	83.8	62.0	79.2	50.0	71.4	80.0	25.0	33.3
SHELLFISH	169	37	50	25	26	7	10	8	6
BUYING HABITS HAVE CHANGED	28.4	8.1	34.0	20.0	38.5	28.6	10.0	75.0	66.7
BUYING HABITS HAVE NOT CHANGED	71.6	91.9	66.0	80.0	61.5	71.4	90.0	25.0	33.3
FROZEN SEAFOOD	169	37	50	25	26	7	10	8	6
BUYING HABITS HAVE CHANGED	32.0	16.2	34.0	24.0	30.8	42.9	30.0	87.5	66.7
BUYING HABITS HAVE NOT CHANGED	68.0	83.8	66.0	76.0	69.2	57.1	70.0	12.5	33.3

TABLE 143B
PERCENTAGE FOR CHANGE IN BUYING HABITS

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
FINFISH	168	55	57	31	25	112	56
BUYING HABITS HAVE CHANGED	33.9%	23.6%	33.3%	41.9%	48.0%	28.6%	44.6%
BUYING HABITS HAVE NOT CHANGED	66.1	76.4	66.7	58.1	52.0	71.4	55.4
SHELLFISH	169	55	58	31	25	113	56
BUYING HABITS HAVE CHANGED	28.4	20.0	27.6	32.3	44.0	23.9	37.5
BUYING HABITS HAVE NOT CHANGED	71.6	80.0	72.4	67.7	56.0	76.1	62.5
FROZEN SEAFOOD	169	55	58	31	25	113	56
BUYING HABITS HAVE CHANGED	32.0	27.3	25.9	32.3	56.0	26.5	42.9
BUYING HABITS HAVE NOT CHANGED	68.0	72.7	74.1	67.7	44.0	73.5	57.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 143C
PERCENTAGE FOR CHANGE IN BUYING HABITS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
FINFISH	168	12	29	42	14	20	11	9	30	1
BUYING HABITS HAVE CHANGED	33.9%	33.3%	41.4%	23.8%	50.0%	45.0%	27.3%	22.2%	30.0%	
BUYING HABITS HAVE NOT CHANGED	66.1	66.7	58.6	76.2	50.0	55.0	72.7	77.8	70.0	
SHELLFISH	169	12	29	42	14	20	11	9	31	
BUYING HABITS HAVE CHANGED	28.4	33.3	24.1	26.2	21.4	35.0	36.4	11.1	32.3	
BUYING HABITS HAVE NOT CHANGED	71.6	66.7	75.9	73.8	78.6	65.0	63.6	88.9	67.7	
FROZEN SEAFOOD	169	12	29	42	14	20	11	9	31	
BUYING HABITS HAVE CHANGED	32.0	33.3	34.5	31.0	42.9	35.0	36.4	-	29.0	
BUYING HABITS HAVE NOT CHANGED	68.0	66.7	65.5	69.0	57.1	65.0	63.6	100.0	71.0	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 144A
PERCENTAGE OF THE MOST POPULAR SELLING SEAFOOD ITEMS

		AVERAGE WEEKLY SEAFOOD SALES PER STORE				
	ALL COMPANIES	UNDER $2,500	$2,500- $4,999	$5,000- $7,499	$7,500- $9,999	OVER $10,000
TOTAL COMPANIES	175	67	46	19	11	7
SHRIMP	61.1%	49.3%	80.4%	63.2%	72.7%	57.1%
SALMON	26.3	13.4	19.6	63.2	72.7	28.6
CATFISH	18.3	19.4	28.3	10.5	9.1	-
ORANGE ROUGHY	16.0	16.4	28.3	10.5	9.1	-
COD	16.0	19.4	15.2	10.5	18.2	-
CRABS	12.0	11.9	10.9	21.1	9.1	-
NATURAL FILLETS	10.3	9.0	17.4	-	-	28.6
PERCH	9.1	13.4	4.3	5.3	-	-
HADDOCK	8.6	11.9	8.7	5.3	-	-
SNAPPER	7.4	10.4	2.2	10.5	9.1	-
FLOUNDER	5.1	3.0	4.3	21.1	-	-
HALIBUT	5.1	4.5	4.3	10.5	9.1	14.3
FROZEN BULK	4.6	9.0	2.2	-	-	-
SHELLFISH	4.6	4.5	6.5	-	-	-
POLLACK	4.6	4.5	4.3	-	9.1	-
SURIMI	3.4	1.5	10.9	-	-	-
TUNA	3.4	1.5	-	10.5	9.1	14.3
SWORDFISH	3.4	1.5	2.2	10.5	9.1	14.3
FRESH FISH	2.9	-	4.3	5.3	-	14.3
WHITING	2.9	7.5	-	-	-	-
LOBSTER	2.9	3.0	2.2	-	-	-
SEATROUT	2.3	3.0	-	-	-	-
SOLE	2.3	3.0	2.2	5.3	-	-
PRAWNS	2.3	1.5	-	-	9.1	14.3
FINFISH (NFI)	2.3	3.0	4.3	-	-	-
SCALLOPS	2.3	1.5	-	-	-	-
WHITEFISH	2.3	4.5	-	-	-	-
BOTTOM FISH	1.7	-	-	5.3	9.1	-
SEA LEGS	1.7	3.0	-	5.3	-	-
BASS	1.1	-	2.2	-	9.1	-
OHI	1.1	1.5	-	-	-	14.3
SHARK	1.1	-	2.2	-	-	-
CROKER	1.1	3.0	-	-	-	-

Continued

TABLE 144A
PERCENTAGE OF THE MOST POPULAR SELLING SEAFOOD ITEMS

		AVERAGE WEEKLY SEAFOOD SALES PER STORE				
	ALL COMPANIES	UNDER $2,500	$2,500-$4,999	$5,000-$7,499	$7,500-$9,999	OVER $10,000
TURBOT	1.1	-	-	-	-	-
OYSTERS	1.1	1.5	2.2	-	-	-
BALS FILLETS	.6	1.5	-	-	-	-
OCEAN FISH (NFI)	.6	1.5	-	-	-	-
FRESH LAKE FISH (NFI)	.6	1.5	-	-	-	-
ROCK FISH	.6	1.5	-	-	-	-
AKU	.6	-	-	-	-	14.3
GROUPER	.6	1.5	-	-	-	-
ANTARTIC QUEEN	.6	-	2.2	-	-	-
TALAPIA	.6	-	2.2	-	-	-
SQUID	.6	-	2.2	-	-	-
SCROD	.6	-	-	-	-	14.3
AMBEYJACK	.6	-	2.2	-	-	-
FARM RAISED SPECIES	.6	-	-	5.3	-	-
MULLET	.6	1.5	-	-	-	-
GRENADERO FILLETS	.6	1.5	-	-	-	-
DOLPHIN	.6	-	-	-	-	-
PREPARED RAW SEAFOOD	.6	-	-	5.3	-	-
FINFISH	.6	1.5	-	-	-	-
STEAK FISH	.6	-	2.2	-	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 144B
PERCENTAGE OF THE MOST POPULAR SELLING SEAFOOD ITEMS

	ALL COMPANIES	COMPANIES WITH 100% OF STORES FEATURING FRESH SEAFOOD	COMPANIES WITH 100% OF STORES FEATURING A SEPARATE DEPARTMENT	COMPANIES WITH 100% OF STORES FEATURING FULL-SERVICE SEAFOOD
TOTAL COMPANIES	175	112	31	40
SHRIMP	61.1%	65.2%	77.4%	75.0%
SALMON	26.3	30.4	38.7	35.0
CATFISH	18.3	16.1	16.1	17.5
ORANGE ROUGHY	16.0	12.5	29.0	20.0
COD	16.0	14.3	22.6	22.5
CRABS	12.0	13.4	12.9	10.0
NATURAL FILLETS	10.3	9.8	6.5	7.5
PERCH	9.1	9.8	9.7	12.5
HADDOCK	8.6	10.7	9.7	12.5
SNAPPER	7.4	8.9	12.9	10.0
FLOUNDER	5.1	3.6	-	-
HALIBUT	5.1	7.1	12.9	10.0
FROZEN BULK	4.6	4.5	-	2.5
SHELLFISH	4.6	3.6	-	2.5
POLLACK	4.6	1.8	3.2	2.5
SURIMI	3.4	1.8	-	-
TUNA	3.4	3.6	-	2.5
SWORDFISH	3.4	4.5	6.5	5.0
FRESH FISH	2.9	3.6	-	-
WHITING	2.9	3.6	3.2	7.5
LOBSTER	2.9	3.6	6.5	2.5
SEATROUT	2.3	1.8	-	-
SOLE	2.3	2.7	-	2.5
PRAWNS	2.3	3.6	-	-
FINFISH (NFI)	2.3	3.6	-	2.5
SCALLOPS	2.3	2.7	3.2	-
WHITEFISH	2.3	1.8	-	-
BOTTOM FISH	1.7	2.7	-	-
SEA LEGS	1.7	1.8	-	-
BASS	1.1	1.8	3.2	2.5
OHI	1.1	1.8	-	-
SHARK	1.1	1.8	-	2.5
CROKER	1.1	.9	3.2	2.5

Continued

TABLE 144B
PERCENTAGE OF THE MOST POPULAR SELLING SEAFOOD ITEMS

	ALL COMPANIES	COMPANIES WITH 100% OF STORES FEATURING FRESH SEAFOOD	COMPANIES WITH 100% OF STORES FEATURING A SEPARATE DEPARTMENT	COMPANIES WITH 100% OF STORES FEATURING FULL-SERVICE SEAFOOD
ANTARTIC QUEEN	.6	.9	-	-
TALAPIA	.6	.9	-	-
SQUID	.6	-	-	-
SCROD	.6	-	-	-
AMBEYJACK	.6	-	-	-
FARM RAISED SPECIES	.6	-	-	-
MULLET	.6	-	-	-
GRENADERO FILLETS	.6	-	-	-
DOLPHIN	.6	.9	3.2	2.5
PREPARED RAW SEAFOOD	.6	.9	-	-
FINFISH	.6	-	-	-
STEAK FISH	.6	.9	-	-
TURBOT	1.1	-	-	-
OYSTERS	1.1	1.8	3.2	2.5
BALS FILLETS	.6	.9	-	-
OCEAN FISH (NFI)	.6	.9	-	-
FRESH LAKE FISH (NFI)	.6	.9	-	-
ROCK FISH	.6	.9	-	2.5
AKU	.6	.9	-	-
GROUPER	.6	.9	-	-

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 145A
PERCENTAGE FOR FEDERALLY INSPECTED FISH AND SHELLFISH

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	161	35	47	25	24	7	9	8	6
FISH AND SHELLFISH SHOULD BE FEDERALLY INSPECTED	85.1%	88.6%	74.5%	84.0%	95.8%	71.4%	100.0%	87.5%	100.0%
FISH AND SHELLFISH SHOULD NOT BE FEDERALLY INSPECTED	14.9	11.4	25.5	16.0	4.2	28.6	-	12.5	-

TABLE 145B
PERCENTAGE FOR FEDERALLY INSPECTED FISH AND SHELLFISH

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	161	52	55	30	24	107	54
FISH AND SHELLFISH SHOULD BE FEDERALLY INSPECTED	85.1%	84.6%	81.8%	80.0%	100.0%	83.2%	88.9%
FISH AND SHELLFISH SHOULD NOT BE FEDERALLY INSPECTED	14.9	15.4	18.2	20.0	-	16.8	11.1

TABLE 145C
PERCENTAGE FOR FEDERALLY INSPECTED FISH AND SHELLFISH

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	161	11	28	37	14	20	11	9	30	1
FISH AND SHELLFISH SHOULD BE FEDERALLY INSPECTED	85.1%	90.9%	92.9%	91.9%	92.9%	75.0%	63.6%	100.0%	73.3%	
FISH AND SHELLFISH SHOULD NOT BE FEDERALLY INSPECTED	14.9	9.1	7.1	8.1	7.1	25.0	36.4	-	26.7	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 146A
PERCENTAGE THE ROLE OF PREPARED FOODS WILL PLAY

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	160	36	44	25	24	7	10	8	6
GREATER ROLE IN SEAFOOD RELATED SALES BY 1991	78.1%	69.4%	81.8%	76.0%	83.3%	57.1%	100.0%	87.5%	66.7%
LESSER ROLE IN SEAFOOD RELATED SALES BY 1991	1.9	2.8	2.3	-	-	-	-	12.5	-
SAME SHARE OF SEAFOOD SALES IN 1991 AS NOW	20.0	27.8	15.9	24.0	16.7	42.9	-	-	33.3

TABLE 146B
PERCENTAGE THE ROLE OF PREPARED FOODS WILL PLAY

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	160	53	53	29	25	106	54
GREATER ROLE IN SEAFOOD RELATED SALES BY 1991	78.1%	67.9%	83.0%	75.9%	92.0%	75.5%	83.3%
LESSER ROLE IN SEAFOOD RELATED SALES BY 1991	1.9	1.9	1.9	3.4	-	1.9	1.9
SAME SHARE OF SEAFOOD SALES IN 1991 AS NOW	20.0	30.2	15.1	20.7	8.0	22.6	14.8

TABLE 146C
PERCENTAGE THE ROLE OF PREPARED FOODS WILL PLAY

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	160	12	28	36	14	20	11	9	29	1
GREATER ROLE IN SEAFOOD RELATED SALES BY 1991	78.1%	83.3%	75.0%	69.4%	78.6%	90.0%	90.9%	77.8%	75.9%	
LESSER ROLE IN SEAFOOD RELATED SALES BY 1991	1.9	-	7.1	-	-	-	-	-	3.4	
SAME SHARE OF SEAFOOD SALES IN 1991 AS NOW	20.0	16.7	17.9	30.6	21.4	10.0	9.1	22.2	20.7	

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1990

TABLE 147

OPERATING RESULTS

(Current & Historical)

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Profit										
Gross Profit with Warehouse	22.4%	23.0%	23.4%	23.7%	24.1%	24.0%	23.6%	23.9%	23.9%	24.0%
Gross Profit without Warehouse	20.9	20.9	21.2	21.5	21.6	22.3	21.3	22.6	22.2	23.4
Net Profit (before taxes)	1.5	1.4	1.5	1.0	1.6	1.8	1.7	1.6	1.2	1.5
Expenses										
Store Labor	8.4	8.5	8.8	8.8	8.9	8.6	8.8	8.6	8.7	8.8
Fringe Benefits	1.9	2.0	2.1	2.2	2.3	2.3	2.2	2.5	2.3	2.4

Source: Food Marketing Institute, Operations Review

HISTORICAL FACTS

TABLE 148

CONSUMER PRICE INDEX*

Annual Average

	ALL ITEMS		FOOD AT HOME		FOOD AWAY FROM HOME	
	C.P.I.	Percent Change	C.P.I.	Percent Change	C.P.I.	Percent Change
1989	124.0	4.8%	124.2	6.5%	121.8	4.6%
1988	118.3	4.1	116.6	4.2	121.8	4.1
1987	113.6	3.7	111.9	4.3	117.0	4.0
1986	109.6	1.9	107.3	2.9	112.5	3.9
1985	107.6	3.6	104.3	1.4	108.3	4.0
1984	103.9	4.3	102.8	3.7	104.2	4.2
1983	99.6	3.2	99.1	1.1	100.0	4.4
1982	96.5	6.1	98.1	3.4	95.8	5.3
1981	90.9	10.4	94.8	7.3	90.9	9.0
1980	82.4	13.5	88.4	8.0	83.4	9.9

* 1982-84 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 149

HISTORICAL DATA

Median Percent Change in Retail Sales	
1988 vs. 1989	6.5%
1987 vs. 1988	6.9
1986 vs. 1987	5.5
1985 vs. 1986	5.5
1984 vs. 1985	5.0
1983 vs. 1984	7.3
1982 vs. 1983	7.6
1981 vs. 1982	8.7
1980 vs. 1981	9.3
1979 vs. 1980	14.1

Median Percent Change in Retail Sales-Identical Stores	
1988 vs. 1989	5.3%
1987 vs. 1988	5.5
1986 vs. 1987	4.0
1985 vs. 1986	4.3
1984 vs. 1985	3.6
1983 vs. 1984	5.6
1982 vs. 1983	6.1
1981 vs. 1982	7.7
1980 vs. 1981	8.1
1979 vs. 1980	11.4

Median Weekly Store Sales	
1989	$193,500
1988	210,770
1987	184,210
1986	171,936
1985	164,408
1984	140,016
1983	122,265
1982	143,678
1981	126,564
1980	110,000

Median Weekly Sales Per Square Foot	
1989	$9.45
1988	9.50
1987	8.80
1986	7.88
1985	8.43
1984	8.00
1983	6.95
1982	7.90
1981	6.75
1980	6.94

Median Sales Per Transaction	
1989	$17.60
1988	16.80
1987	16.30
1986	16.04
1985	16.33
1984	15.36
1983	14.60
1982	14.33
1981	14.23
1980	12.10

Average Number of Items in a Supermarket	
1989	24,855
1988	26,430
1987	24,531
1986	19,857
1985	17,459
1984	15,379
1983	16,719
1982	13,067
1981	12,877
1980	14,145

Definitions

Chain	Retailers with eleven (11) or more supermarkets.
Delivery Cost	The total amount of delivery expense charged to the retail store operation, including salaries, fringe benefits including payroll taxes, equipment depreciation and rental, taxes and licenses, insurance, repairs, gas and oil, and operating supplies.
Fringe Benefits	The company's share of payroll taxes (including those payable under the Federal Insurance Contribution Act, state and federal unemployment compensation, Workers' Compensation), holiday and vacation pay, group insurance, pension, profit sharing, retirement, severance pay, and bonus unless it is a significant amount paid on a regular, recurring basis.
Identical Stores	Supermarkets in operation throughout the entire two-year period, 1988 and 1989.
Independent	Retailers with ten (10) or fewer supermarkets.
Scratch Rate	Percentage of items ordered from the distribution center but not shipped to the store.
Selling Area	Customer area of the store.
Shortage (Shrink)	Computed using the "retail method," it includes all inventory shortages, including disappearance, spoilage and damaged merchandise for which there is no supplier reimbursement. Shrink is reported at retail value as a percent of sales.
Store Door Margin	Gross profit after any wholesaler's fees minus warehouse, delivery, and headquarter's cost are deducted.
Store Labor Expense	The payment to all store personnel including the store manager, for straight and overtime wages and regular recurring bonus payments. Payments for sickness, absence, excused time off, training and commissions are included in this figure.
Store Rent and Real Estate	Rent paid for store building and parking lot, real estate taxes and insurance and amortization of lease-hold improvement.
Store Supplies	The expense incurred for checkout, wrapping and prepackaging supplies and maintenance supplies for cleaning, window washing, etc.
Supermarket	A retail food store with annual sales of at least $2 million a year. Conventional Supermarkets (under 30,000 total sq. ft.). Super Stores (over 30,000 total sq. ft., expanded food and non-food selection). Combination Stores (over 30,000 total sq. ft. and at least 25% of area in General Merchandise).

Limited Assortment Stores (carries less than 1000 items and offers few if any perishables with a "no frills" shopping environment).

Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service).

Utilities Expense The cost for heating, light, water and power.

Warehouse Cost The total amount of warehouse expense charged to the retail store operation, including such items as salaries, fringe benefits, warehouse rental, equipment rental or depreciation, utility cost and supplies.

Wholesaler A company which reported wholesale sales in 1984 to supermarkets, institutions and/or businesses other than those owned by the company and primarily engaged in selling a general line of food and related products to food stores.

A. Cooperative:
(Independent) – Retailers who are stockholder members of cooperative wholesale buying groups.

B. Voluntary:
(Independent) – Retailers who belong to voluntary merchandising groups sponsored by wholesalers and who operate under a common name.

C. Unaffiliated:
(Independent) – Retailers who are not affiliated with either wholesale, cooperative or voluntary merchandising groups sponsored by wholesalers.

Region The geographic area in which the company headquarters is located. Listed below are the states which fall into each region.

New England
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Middle Atlantic
New Jersey
New York
Pennsylvania

East North Central
Illinois
Indiana
Michigan
Ohio
Wisconsin

West North Central
Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southeast
Alabama
Delaware
District of Columbia
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

West South Central
Arkansas
Louisiana
Oklahoma
Texas

Mountain
Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Pacific
Alaska
California
Hawaii
Oregon
Washington

Canada

QUESTIONNAIRES

FOLLOWING ARE SAMPLES OF THE SURVEY FORMS USED TO COLLECT DATA FOR THE 1990 REPORT

FMI
FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1990
QUESTIONNAIRE ON SUPERMARKET OPERATIONS

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket operations. We encourage your participation so that the results may be as representative of the industry as possible. All data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please contact Mike McCarthy in the Research Department of FMI at 202-429-8277.

I. GENERAL OPERATIONS

1. How many supermarkets is your company currently operating (a supermarket is a retail food store with at least $2 million in annual sales)

___,___ ___ ___ supermarkets

2. What were your retail sales in (if 1989 figures are not available, please give an estimate):

a. 1988 . . . . . . ___ ___,___ ___ ___.___ million

b. 1989 . . . . . . ___ ___,___ ___ ___.___ million

3. What were your sales for "identical stores" (those supermarkets you had in operation throughout the entire two-year period, 1988 and 1989) in:

a. 1988 . . . . . . ___ ___,___ ___ ___.___ million

b. 1989 . . . . . . ___ ___,___ ___ ___.___ million

4. What percentage of your operation is supplied by the following:

a. own warehouse . . . . ___ ___ ___.___%

b. voluntary wholesaler . . . . ___ ___ ___.___%

c. cooperative wholesaler. . . . ___ ___ ___.___%

d. unaffiliated wholesaler . . ___ ___ ___.___%

e. direct vendor deliveries . . ___ ___ ___.___%

TOTAL 1 0 0. 0

5a. What percentage of your total supermarket sales in 1989 is accounted for by NON-FOODS? (include HBC, Tobacco, and other "General Merchandise") . . . ___ ___.___%

5b. (Optional) What percentage of your total supermarket sales in 1989 is accounted for by each of the following non-food areas:

Health and Beauty Care Products . ___ ___.___%

Tobacco . . . . ___ ___.___%

Other non-foods . . . . ___ ___.___%

TOTAL (should add to total in Q.5a) ___ ___.___%

6. Please provide total company data for each of the following items:

a. Average weekly sales per supermarket in 1989 . . . . . $___,___ ___ ___,___ ___ ___

b. Average number of checkouts in your stores in 1989 . . ___ ___

c. Average sale per customer transaction in 1989 . . . . $___ ___.___ ___

d. Average weekly sales per square foot of selling area (divide average weekly sales for all your supermarkets in operations the entire year by the number of square feet of selling area - customer area in the those stores) . . . . . $___ ___.___ ___

e. Total size, in square feet of your typical store . . . . . . ___ ___ ___,___ ___ ___

f. Average retail price per item for all items sold in your stores in 1989 . $___.___ ___

6. (continued)

g. On average, how many different items does your typical supermarket carry (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item) ___ ___,___ ___ ___

h. Average sales per labor hour for store employees in 1989 (actual hours worked by store personnel, including managers, divided into sales) . . . . $___ ___ ___.___ ___

7. Please complete the following chart for each type of store you operate. If you do not operate a particular store type, please enter NA. Even though your company's definitions of store type may differ from the categories that follow, we ask that you use the formats as defined here. This will keep the store type data consistent for industry-wide information.

	Supermarkets of 30,000 and under total square feet.	Supermarkets over 30,000 total sq. ft. (PLEASE DO NOT INCLUDE COMBO STORES; SEE NEXT COLUMN)	Combination Stores over 30,000 total and at least 25% of area in non-foods (general merchandise)	**Warehouse Stores: use utilitarian fixtures and emphasizes lowered prices at expense of cust. service**
Number of Each Type of Store	___ ___	___ ___	___ ___	___ ___
Average Weekly Sales per Store	$___ ___ ___,___ ___ ___	$___ ___ ___,___ ___ ___	$___ ___ ___,___ ___ ___	$___ ___ ___,___ ___ ___
Average Number of Checkouts per Store	___ ___	___ ___	___ ___	___ ___
Average Sale per Customer Transaction	$ ___ ___.___ ___	$ ___ ___.___ ___	$ ___ ___.___ ___	$ ___ ___.___ ___
Sales per Labor Hour*	$___ ___ ___.___ ___	$___ ___ ___.___ ___	$___ ___ ___.___ ___	$___ ___ ___.___ ___
Average Weekly Sales per Sq. Ft. of Selling Area	$___ ___.___ ___	$___ ___.___ ___	$___ ___.___ ___	$___ ___.___ ___
Average Total Size in Sq. Ft.	___ ___ ___,___ ___ ___	___ ___ ___,___ ___ ___	___ ___ ___,___ ___ ___	___ ___ ___,___ ___ ___
Average Retail Price per Item	$ ___.___	$ ___.___ ___	$ ___.___ ___	$ ___.___ ___
Average Number of Items Carried	___ ___,___ ___ ___	___ ___,___ ___ ___	___ ___,___ ___ ___	___ ___,___ ___ ___

*See definition in Question 6h, above

II. CUSTOMER SERVICES

8. Please indicate the number of your stores which offer the following services:

a. Deli offering carry-out items ___,___ ___ ___

b. Lunch counter/ snack bar . . . ___,___ ___ ___

c. Service meat . . . . . . ___,___ ___ ___

d. Fresh seafood . . . ___,___ ___ ___

e. Scratch and/or bake-off bakery ___,___ ___ ___

f. In-store banks. . . . . ___,___ ___ ___

g. Home delivery service . . . . ___,___ ___ ___

h. Postage stamps . . . ___,___ ___ ___

j. Reading Center. . ___,___ ___ ___

k. Floral/ plant shop ___,___ ___ ___

l. Salad Bar . . ___,___ ___ ___

m. Photo service ___,___ ___ ___

n. Cosmetic center . . ___,___ ___ ___

o. Video Rental . . ___,___ ___ ___

p. Nutritional shelf tags ___,___ ___ ___

q. Greeting Cards . . ___,___ ___ ___

r. Restaurant . ___,___ ___ ___

s. Courtesy booth___,___ ___ ___

t. Wine . . . . ___,___ ___ ___

u. Liquor . . . ___,___ ___ ___

v. Beer . . . . ___,___ ___ ___

w. Pharmacy . . ___,___ ___ ___

x. Catering . . ___,___ ___ ___

i. Cash Dispensing Machines (Automatic Teller Machines or ATMs) ___,___ ___ ___

III. CUSTOMER PAYMENT METHODS

9. What percentage of your customer's transactions* were paid for:

___ ___ ___.___% by check

___ ___ ___.___% with cash

___ ___ ___.___% with food stamps

___ ___ ___.___% other method

1 0 0 . 0 %

*NOTE: This question asks for the number of transactions paid for by check, cash, etc. as a percentage of total transactions.

10. How many checks did each of your supermarkets typically accept per week? ___ ___,___ ___ ___ checks

11. What was the average value of the checks accepted? $___ ___ ___.___ ___

12. How many checks accepted per week per supermarket were returned due to insufficient funds? ___ ___ ___ checks

13. How many checks were written off as uncollectable per store per week? ___ ___ ___ checks

14. What was the average value of the checks that were written off? $___ ___ ___.___ ___

15. HOW MANY of your supermarkets accept credit cards for (if none, please put "0"):

Grocery items . . . . ___,___ ___ ___ supermarkets

Pharmaceutical items and/or non-foods ___,___ ___ ___ supermarkets

IV. TECHNOLOGY

16. In how many stores are you now scanning? ___,___ ___ ___ stores
(If you are not scanning in any of your stores, please go to question 18)

17. In which of the following areas are you currently using (in 1989) or planning to use (in 1990) your scanning POS/data (please check)? Also check whether the data are used at the headquarters level, the store level, or both.

	1989		1990	
	Headquarters	Store Level	Headquarters	Store Level
a. Checker performance	☐	☐	☐	☐
b. Labor scheduling	☐	☐	☐	☐
c. Shelf space management	☐	☐	☐	☐
d. Shrink analysis	☐	☐	☐	☐
e. Electronic shelf tags	☐	☐	☐	☐
f. Computer assisted ordering	☐	☐	☐	☐
g. Price elasticity analysis	☐	☐	☐	☐
h. Display/Ad analysis	☐	☐	☐	☐
i. Marketing by store cluster	☐	☐	☐	☐
j. Marketing by individual store	☐	☐	☐	☐
k. Frequent shopper programs	☐	☐	☐	☐

18. Please check your company's present level of involvement with Computerized Space Management (please check, if no experience please skip to Q. 20)?

a. No experience with space management . . ☐
b. Investigated space management . . . . . ☐
c. Tested space management . . . . ☐
d. Received approval to implement ☐
e. Actually implemented . . . . ☐
f. Changed your routine business practices . . . . . ☐

19. If you have any involvement with Computerized Space Management, in what areas of your company is it being applied?

a. Headquarters . . . . ☐
b. Store clusters . . . . ☐
c. Individual stores . . . . . . ☐

20. Please check your company's level of involvement with Direct Product Profit (DPP)?

a. No experience with DPP . . . . ☐
b. Investigated DPP . . . . ☐
c. Tested DPP . . . . ☐
d. Received approval to implement ☐
e. Actually implemented DPP . . ☐
f. Changed routine business practices due to DPP ☐

21. If you have any involvement with DPP, in what areas of your company is it being applied?

a. Headquarters . . . . ☐
b. Store clusters . . . . ☐
c. Individual stores . . . . . . ☐
d. Distribution center . . . . . ☐

22. In what store areas are you using DPP (please check)?

a. Dry Grocery . . . . . ☐
b. Perishable . . . . . . ☐
c. General Merchandise . . . ☐
d. Health and Beauty Care . . . ☐

23. Are you using DPP in conjunction with a computerized space management program? YES ☐ NO ☐

FOOD MARKETING INSTITUTE

FOOD MARKETING INDUSTRY SPEAKS, 1990
WHOLESALE OPERATIONS QUESTIONNAIRE

This survey is part of FMI's annual study, designed to track trends in the food distribution industry. You are encouraged to participate so that we may obtain data as representative of the industry as possible. Please answer as many questions as you are able. All individual company data will be held in strictest confidence. If you have any questions, please feel free to contact Mike McCarthy in our research department at 202-429-8277.

I. GENERAL OPERATIONS

1. Which of the following best describes your company? (please check only one)

   a. Cooperative wholesaler . . . . ☐
   b. Voluntary wholesaler . . . . ☐
   c. Affiliated wholesaler . . . . ☐
   d. Wholesaler also operating retail stores . . . ☐

2. What were your company sales in (if 1989 figures are not available, please give an estimate):

   a. 1988 $___ ___,___ ___ ___.___ million
   b. 1989 $___ ___,___ ___ ___.___ million

3. How many supermarkets does your operation serve/own? (A supermarket is a retail food store with annual sales of at least $2 million)

   a. serve as a wholesaler ___,___ ___ ___ stores
   b. company owned ___,___ ___ ___ stores

4. What percentage of your total annual shipping volume in dollars is attributed to:

   a. Company owned stores ___ ___ ___.___%
   b. Independent food stores ___ ___ ___.___%
   c. Other food chains (11+ stores) ___ ___ ___.___%
   d. Convenience stores ___ ___ ___.___%
   e. Food service/institutional service ___ ___ ___.___%
   TOTAL 1 0 0 . 0%

II. SERVICES

5. Does your company provide any of the following services to your retailers? (Please check all that are applicable)

A. STORE OPERATIONS
1. Retail Accounting ☐
2. Individual Retail Pricing Program ☐
3. Product Movement Data ☐
4. Gross Margin Report by Item ☐
5. Space Management ☐
6. Scanning Support ☐
7. DSD System ☐
8. Electronic Ordering ☐
9. Member payroll ☐

B. PRODUCTS
1. Handle Private Label ☐
2. Handle Generic Label ☐

C. HUMAN RESOURCES
1. Industrial relations support ☐
2. Labor control support ☐
3. Educational training programs ☐

D. STORE PLANNING AND DEVELOPMENT
1. Real Estate/Site Development ☐
2. Store Planning & Engineering ☐
3. Interior Design & Decor Support ☐
4. Equipment & Fixture Financing ☐
5. Lease Financing ☐
6. Equipment Financing ☐

E. OTHER SERVICES
1. Electronic Funds Transfer, e.g. ATMS, direct debit cards, etc. ☐
2. Insurance ☐
3. Credit Union ☐

5. (cont.) Please list below any other services your firm provides its retail customers:

____________________ ____________________

____________________ ____________________

____________________ ____________________

III. ADVERTISING

6. Do you provide advertising services to your retailers? YES /__/ NO /__/
(If NO, you need not complete the rest of the questionnaire)

7. How many ad-groups does your company support? ___ ___ ___ ad groups

8. What was your company's promotional budget
as a percentage of annual sales in 1989? ___.___ ___ percent (SAMPLE ANSWER: 1.35%)

Are co-op dollars included in this percentage? /__/ YES /__/ NO

If YES, what percentage of your advertising expenses are co-op? ___ ___.___ percent

FOOD MARKETING INSTITUTE

FOOD MARKETING INDUSTRY SPEAKS, 1990
DISTRIBUTION CENTER OPERATIONS SURVEY

This questionnaire is part of FMI's annual industry study. It is designed to provide descriptive and comparative information for food distribution industry. This year's Distribution Center segment of the study will examine the use of engineered labor standards in the industry. Only with your participation and expertise can concise and representative data be developed. All individual company data will be held in strictest confidence. If you have any questions, please feel free to contact Mike McCarthy in the research department of FMI -- (202)429-8217.

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1. Which of the following best describes your company (Please check only one)?

a. /__/ retailer
b. /__/ cooperative wholesaler
c. /__/ voluntary wholesaler
d. /__/ unaffiliated wholesaler
e. /__/ combined retailer/wholesaler

2. What will your company's annual sales be in 1989 (please check)?

/__/ Less than $50 million
/__/ $50 to $99 million
/__/ $100 to $149 million
/__/ $150 to $249 million
/__/ $250 to $499 million
/__/ $500 million to $1 billion
/__/ $1 to $3 billion
/__/ Over $3 billion

3. How many DRY GROCERY distribution centers does your company currently operate? . . . . . . ____ centers

4. In how many of these centers have you implemented engineered labor standards? . . . . . . ____ centers

5a. In how many centers are you planning to implement standards in 1990? . . . . ____ centers

5b. in 1991? . . . . ____ centers

5c. in 1992? . . . . ____ centers

6. How many perishable distribution centers does your company operate? . . . . ____ centers/sections

7. In how many of these centers have you implemented engineered labor standards? . . . . . . ____ centers/sections

8a. In how many perishable centers are you planning to implement standards in 1990? . . . . . ____ centers/sections

8b. in 1991? . . . . ____ centers/sections

8c. in 1992? . . . . ____ centers/sections

IF YOU HAVE NOT IMPLEMENTED ENGINEERED LABOR STANDARDS IN ANY OF YOUR DRY GROCERY CENTERS, YOU NEED NOT COMPLETE THE REST OF THE QUESTIONNAIRE. PLEASE COMPLETE THE INFORMATION AT THE BOTTOM OF PAGE 4 AND MAIL IT TO FMI IN THE ENCLOSED ENVELOPE. THANK YOU FOR YOUR COOPERATION.

PLEASE REPORT ANSWERS TO THE FOLLOWING QUESTIONS FOR EACH DRY GROCERY CENTER THAT YOUR COMPANY OPERATES WHICH HAS IMPLEMENTED ENGINEERED LABOR STANDARDS. IF YOU OPERATE MORE THAN FOUR CENTERS, PLEASE FEEL FREE TO COPY THESE PAGES OR SIMPLY PROVIDE A REPRESENTATIVE SAMPLE OF YOUR OPERATIONS.

	CENTER #1	CENTER #2	CENTER #3	CENTER #4
9. What is the center's annual dollar volume at cost* in millions (if 1989 figures are not available, please estimate)?	$______.__	$______.__	$______.__	$______.__
10. What is the total center size in square feet?	____________	____________	____________	____________
11. How many people are employed in the center (include all employees)?	________	________	________	________
12. Are the majority of the center's employees (please circle): 1) unionized, 2) non-unionized?	1 2	1 2	1 2	1 2
13. What is the primary selection method in the center (please circle)? 1) manual/conventional selection 2) select to conveyor	1 2	1 2	1 2	1 2
14. How many supermarkets are served by the center? **	________	________	________	________
15. How many years have standards been in effect in this center?	_____ years	_____ years	_____ years	_____ years
16. What techniques were used to develop the standards (please circle) 1) Time study (stopwatch) 2) Pre-determined standards	1 2	1 2	1 2	1 2
17. How were the standards developed (please circle all that apply)? 1) Outside consultant 2) In-house with computer software 3) In-house with employee and supervisor input 4) Union input	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4
18. Where applicable, Are the standards included in the union contract (please circle)?	Yes No NA	Yes No NA	Yes No NA	Yes No NA

* Cost should include the following: Original cost of merchandise less discounts and allowances and freight-in.

** A supermarket is a retail food store with at least $2 million in annual sales.

	CENTER #1	CENTER #2	CENTER #3	CENTER #4
19. In what areas have the standards been implemented (circle all that apply) 1) receiving 2) put-away & replenishment 3) loading 4) selection	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4
20. Are the standards used to: (circle all that apply) 1) track individual productivity 2) track area productivity 3) track shift productivity 4) plan shifts	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4
21. Was there a training program to help employees implement the standards (please circle)?	Yes No	Yes No	Yes No	Yes No
22. If applicable, have the standards been challenged by outside arbitration (please circle)	Yes No NA	Yes No NA	Yes No NA	Yes No NA
23. How are employees measured against the standards (please circle all that apply)? 1) by computer 2) supervisor observation 3) other methods	1 2 3	1 2 3	1 2 3	1 2 3
24. On a percentage basis, approximately how much has productivity improved since the standards were implemented	______%	______%	______%	______%
25. Are incentives given for employees to meet the standards (If you answer NO, please skip to question 27)	Yes No	Yes No	Yes No	Yes No
26. What incentives are used (please circle): 1) extra pay 2) time off, 3) other. If you answered OTHER, please specify on the adjacent lines.	1 2 3 ____________ ____________ ____________ ____________	1 2 3 ____________ ____________ ____________ ____________	1 2 3 ____________ ____________ ____________ ____________	1 2 3 ____________ ____________ ____________ ____________

	CENTER #1	CENTER #2	CENTER #3	CENTER #4
27. Are the standards updated periodically (If NO, please skip to question 29)?	Yes No	Yes No	Yes No	Yes No
28. How often (please circle)? 1) Annually 2) Bi-annually 3) Quarterly 4) Monthly 5) Other If you answered OTHER, please specify on the adjacent lines.	1 2 3 4 5 __________ __________ __________ __________	1 2 3 4 5 __________ __________ __________ __________	1 2 3 4 5 __________ __________ __________ __________	1 2 3 4 5 __________ __________ __________ __________
29. In what geographic region is the center located (please circle, see below for listing of states)? 1) New England 2) Middle Atlantic 3) East North Central 4) West North Central 5) Southeast 6) West South Central 7) Mountain 8) Pacific	1 2 3 4 5 6 7 8	1 2 3 4 5 6 7 8	1 2 3 4 5 6 7 8	1 2 3 4 5 6 7 8

LIST OF FMI GEOGRAPHIC REGIONS

New England
Connecticut
Maine
Massachusetts
New Hampshire
Vermont

Middle Atlantic
New Jersey
New York
Pennsylvania

East North Central
Illinois
Indiana
Michigan
Ohio
Wisconsin

West North Central
Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southeast
Alabama
Delaware
Washington, DC
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

West South Central
Arkansas
Louisiana
Oklahoma
Texas

Mountain
Arizona
Colorado
Idaho
Montana
Nevada
Utah
Wyoming

Pacific
Alaska
California
Hawaii
Oregon
Washington

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1990
QUESTIONNAIRE ON SUPERMARKET ADVERTISING

This survey is part of FMI's annual study of the food distribution industry, the Food Marketing Industry Speaks. This project is designed to track trends in supermarket advertising. Only with your help can we develop data that are as representative of the industry as possible. You will receive a complimentary copy of the printed results of this study. Please answer as many questions as possible. All individual company data will be held in strictest confidence. If you have any questions, please feel free to contact the FMI research department at 202-429-8276.

I. GENERAL QUESTIONS

1. Who accomplishes each of the following functions in your company?

	Someone in the firm	Whole-saler	Ad Agency	Free-Lance	News-paper	Not Applicable
Who designs newspaper ads?	☐	☐	☐	☐	☐	☐
Who handles TV?	☐	☐	☐	☐	☐	☐
Who handles radio?	☐	☐	☐	☐	☐	☐
Who designs mailers/flyers?	☐	☐	☐	☐	☐	☐

2. Who selects the sale items in your stores? Please specify by title(s) and function(s) such as President, Store Manager, Product Department Manager, etc.

____

____

3. Who creates your in-store signage? Please specify by title(s) and function(s) or type of company? ______________________________

II. ADVERTISING BUDGETS

4. What percentage of your company's annual sales was spent on advertising in 1989? ___.___ ___ percent (SAMPLE ANSWER: 1.35%)

Are co-op dollars included in this percentage? ☐ YES ☐ NO

If YES, what percentage of your advertising expenses are co-op? ___ ___.___ percent

5. What percentage of your advertising budget was spent on:

newspaper	___ ___.___
radio	___ ___.___
television	___ ___.___
targeted mailer/flyer	___ ___.___
in-store coupons	___ ___.___
billboards	___ ___.___
other	___ ___.___
TOTAL	1 0 0 . 0%

Printed on recycled paper

6. Which of the following are included in the advertising budget (please check)?

- ☐ Television air time
- ☐ Advertising personnel salaries
- ☐ Radio air time
- ☐ Signage
- ☐ Production
- ☐ Ad agency fees
- ☐ Promotions
- ☐ Store coupons
- ☐ Institutional advertising
- ☐ Consumer research
- ☐ Newspaper advertising
- ☐ Direct mail

☐ OTHER (Please specify) . . . . ______________________________

____

III. ADVERTISING PERSONNEL

7. Do you have a person or department in your company whose main function is advertising?

☐ YES (If YES, Go to question 8)   ☐ NO (If NO, go to question 15)

8. What is the title and function of the senior executive in your company with responsibility for advertising (such as Director of Advertising, Vice President, Marketing)?

Title ______________________________

9. What percentage of this person's time is spent on advertising? ___ ___ ___%

10. To whom does this person report?

Title ______________________________

11. How many employees work in the advertising department? (Please include all personnel, including fractional time if a person also works in another department or is part-time. Include all divisions.)

__________ clerical personnel   __________ professional personnel

IV. ACTIVITIES OF THE DEPARTMENT

12. Please check the activities which your advertising department is actually doing IN-HOUSE:

- ☐ design print ads in black and white
- ☐ design print ads in four color
- ☐ typesetting
- ☐ write scripts
- ☐ TV commercial production
- ☐ develop slide presentations
- ☐ photography
- ☐ design/produce company newsletters
- ☐ radio commercial production
- ☐ media buying

13a. Does your company have in-house printing capabilities?

- ☐ YES, in the ad department
- ☐ YES, in another department (please name the department) ______________________________
- ☐ NO (please skip to question 14)

13b. If you answered YES to question 13a, what in-house printing capabilities does your company currently have (please check all applicable)?

- ☐ Sign shop
- ☐ Larger printers (sheet fed)
- ☐ Small printers
- ☐ Web fed printers

14. Does your department have in-house computer graphic capabilities?

☐ YES   ☐ NO

V. MEDIA

15. Does your company advertise on radio?   ☐ YES   ☐ NO (if no, skip to Q. 17)

16. How many gross rating points were earned in a typical week for your radio ads?   ___ ___ ___ GRPs

17. Does your company advertise on television?   ☐ YES   ☐ NO (if no, skip to Q. 19)

18. How many gross rating points were earned in a typical week for your TV ads? ___ ___ ___ GRPs

19. Does your company use pre-printed inserts? Yes ☐ No ☐ (If NO, skip to Q. 22)

20. How many different pre-printed inserts do you develop per year? ___ ___. ___ per year
NOT quantity printed

21. What types of inserts have you used? (please check all that are applicable)

Heat set	☐	Newsprint	☐	marriage mail	☐
Four-color	☐	Two-color	☐	Other (specify)	☐
Black and White	☐	Roto graveure	☐	______________	

22. Do you use run-of-print ads (ROPS)? Yes ☐ No ☐ (If NO, skip to Q. 25)

23. How many days per week do you run these ads? ___ days per week

24. How many pages do you typically run? ___ ___ pages

25. Does your company retain an ad agency on a regular basis ☐ YES ☐ NO

26. Please check the media used by your company to advertise. For each media type you are using, please check who primarily performs that function (check all that apply).

			PRODUCTION	
	USE	IN-HOUSE	AD AGENCY	FREE-LANCE
Newspapers	☐	☐	☐	☐
Television	☐	☐	☐	☐
Cable TV	☐	☐	☐	☐
Billboards	☐	☐	☐	☐
Radio	☐	☐	☐	☐
Mailer/Flyers	☐	☐	☐	☐
Magazine	☐	☐	☐	☐

27. Please check any of the areas in which the advertising department used scanning data in 1989 and also those areas in which you are planning to use it in 1990.

	1989	1990		1989	1990
Display/Ad analysis	☐	☐	Frequent shopper programs	☐	☐
Planning/Goal setting	☐	☐	Marketing by individual store	☐	☐
Marketing by store clusters	☐	☐			

Please list any other uses of scanning/POS data in the advertising department.

	1989	1990
______________________________	☐	☐
______________________________	☐	☐

VI. TYPES OF ADVERTISING AND PROMOTIONS

28. Looking at the following list, is your company currently involved in any of the following areas or are you planning on becoming involved in 1990? (Please check all applicable)

	1989	1990		1989	1990
Frequent shopper programs	☐	☐	Marketing by store cluster	☐	☐
Electronic coupons	☐	☐	Direct mail	☐	☐
Marketing by individual store	☐	☐	Other types of promotions	☐	☐

(If you answer OTHER, please specify below)

____

____

29. How does your company measure the effects of its advertising (please check all that apply)?

Sales ☐
Inventory Management ☐
Customer Traffic ☐
Coupon Redemption ☐
Customer Reaction ☐
Management Reaction ☐
Customer Surveys ☐
Scanning/POS data ☐

Other (please specify) ____________________

30. Please check if your company runs individual ads or entire campaigns emphasizing any of the following areas. Also, please check if it was an individual ad only or part of a campaign. Check also if you did so 1989 or plan to for 1990

	1989		1990	
	ADS	CAMPAIGN	ADS	CAMPAIGN
Quality produce/produce department	☐	☐	☐	☐
Quality meats/meat department	☐	☐	☐	☐
Food and product safety	☐	☐	☐	☐
Nutrition/Health	☐	☐	☐	☐
Environmentally safe products, packaging, etc.	☐	☐	☐	☐
Store Image	☐	☐	☐	☐
Public Service	☐	☐	☐	☐
Low-price/Price promotion	☐	☐	☐	☐
Good variety/wide selection	☐	☐	☐	☐
Good service	☐	☐	☐	☐

Please name any other features of your company that you emphasized in your advertising and check if it was in individual ads only or in campaigns. Check also if it was in 1989 or planned for 1990

	1989		1990	
FEATURE EMPHASIZED:	ADS	CAMPAIGN	ADS	CAMPAIGN
____________________	☐	☐	☐	☐
____________________	☐	☐	☐	☐
____________________	☐	☐	☐	☐
____________________	☐	☐	☐	☐

VII. GENERAL COMPANY INFORMATION

31. How many supermarkets is your company currently operating? (a supermarket is a retail food store with at least $2 million in annual sales)?.

___,___ ___ ___ supermarkets

32. What will be your company's total annual food sales in 1989? (if exact figures are not available, please estimate)

$___ ___,___ ___ ___.___ million

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1990
QUESTIONNAIRE FOR WHOLESALE AD-GROUPS

This survey is part of FMI's annual study of the food distribution industry, the Food Marketing Industry Speaks. Only with your help can we develop data that are as representative of the industry as possible. Please answer as many questions as possible. All individual company data will be held in strictest confidence. You will receive a complimentary copy of this study. If you have any questions, please feel free to contact the FMI research department at 202-429-8276.

GENERAL INSTRUCTIONS

Please answer this questionnaire on behalf of the ad-group that you represent. If you represent more than on in-house ad-group, please answer a separate questionnaire for each.

I. GENERAL QUESTIONS

1. Who accomplishes each of the following functions for your ad-group?

	Someone in the stores	Whole-saler-(you)	Ad Agency	Free-Lance	News-paper	Not Applicable
Who designs newspaper ads?	☐	☐	☐	☐	☐	☐
Who handles TV?	☐	☐	☐	☐	☐	☐
Who handles radio?	☐	☐	☐	☐	☐	☐
Who designs mailers/flyers?	☐	☐	☐	☐	☐	☐

2. Who selects the sale items in the stores? Please specify by title(s) and function(s) such as President, Store Manager, Product Department Manager, etc.

____

____

3. Who creates the in-store signage? Please specify by title(s) and function(s) or type of company? _______________________________

II. ADVERTISING BUDGETS

4. What percentage of your ad-group's annual sales was spent on advertising in 1989? ___.___ ___ percent (SAMPLE ANSWER: 1.35%)

Are co-op dollars included in this percentage? ☐ YES ☐ NO

If YES, what percentage of your advertising expenses are co-op? ___ ___.___ percent

5. What percentage of your advertising budget was spent on:

newspaper	___ ___.___
radio	___ ___.___
television	___ ___.___
targeted mailer/flyer	___ ___.___
in-store coupons	___ ___.___
billboards	___ ___.___
other	___ ___.___
TOTAL	1 0 0 . 0%

6. Which of the following are included in the advertising budget (please check)?

☐ Television air time
☐ Advertising personnel salaries
☐ Radio air time
☐ Signage
☐ Production
☐ Ad agency fees
☐ Promotions
☐ Store coupons
☐ Institutional advertising
☐ Consumer research
☐ Newspaper advertising
☐ Direct mail

☐ OTHER (Please specify) . . . . ______________________________
____

III. ADVERTISING PERSONNEL

7. Do you have a person or department in your company whose main function is advertising?

☐ YES (If YES, Go to question 8) ☐ NO (If NO, go to question 15)

8. What is the title and function of the senior executive in your company with responsibility for advertising (such as Director of Advertising, Vice President, Marketing)?

Title ______________________________

9. What percentage of this person's time is spent on advertising? ___ ___ ___%

10. To whom does this person report?

Title ______________________________

11. How many employees work in the advertising department? (Please include all personnel, including fractional time if a person also works in another department or is part-time. Include all divisions.)

__________ clerical personnel __________ professional personnel

IV. ACTIVITIES OF THE DEPARTMENT

12. Please check the activities which your advertising department is actually doing for your ad-group IN-HOUSE:

☐ design print ads in black and white
☐ design print ads in four color
☐ typesetting
☐ write scripts
☐ TV commercial production
☐ develop slide presentations
☐ photography
☐ design/produce company newsletters
☐ radio commercial production
☐ media buying

13a. Does your company have in-house printing capabilities?

☐ YES, in the ad department
☐ YES, in another department
(please name the department) ______________________________
☐ NO (please skip to question 14)

13b. If you answered YES to question 13a, what in-house printing capabilities does your company currently have (please check all applicable)?

☐ Sign shop
☐ Larger printers (sheet fed)
☐ Small printers
☐ Web fed printers

14. Does your department have in-house computer graphic capabilities?

☐ YES ☐ NO

V. MEDIA

15. Does your ad-group advertise on radio? ☐ YES ☐ NO (if no, skip to Q. 17)

16. How many gross rating points were earned in a typical week for your radio ads? ___ ___ ___ GRPs

17. Does your ad-group advertise on television? ☐ YES ☐ NO (if no, skip to Q. 19)

18. How many gross rating points were earned in a typical week for your TV ads? ___ ___ ___ GRPs

19. Does your ad-group use pre-printed inserts? Yes ☐ No ☐ (If NO, skip to Q. 22)

20. How many different pre-printed inserts do you develop for your ad-group per year? (This means the number of different pieces developed, not the quantity printed) ___ ___ ___ per year

21. What types of inserts have you used? (please check all that are applicable)

Heat set	☐	Newsprint	☐	marriage mail	☐
Four-color	☐	Two-color	☐	Other (specify)	☐
Black and White	☐	Roto graveure	☐	______________	

22. Do you use run-of-print ads (ROPS)? Yes ☐ No ☐ (If NO, skip to Q. 25)

23. How many days per week do you run these ads? ___ days per week

24. How many pages do you typically run? ___ ___ pages

25. Does your ad-group retain an ad agency on a regular basis ☐ YES ☐ NO

26. Please check the media used by your ad-group to advertise. For each media type you are using, please check who primarily performs that function (check all that apply).

	USE	IN-HOUSE	PRODUCTION AD AGENCY	FREE-LANCE
Newspapers	☐	☐	☐	☐
Television	☐	☐	☐	☐
Cable TV	☐	☐	☐	☐
Billboards	☐	☐	☐	☐
Radio	☐	☐	☐	☐
Mailer/Flyers	☐	☐	☐	☐
Magazine	☐	☐	☐	☐

27. Please check any of the areas in which the advertising department used scanning data in 1989 and also those areas in which you are planning to use it in 1990.

	1989	1990		1989	1990
Display/Ad analysis	☐	☐	Frequent shopper programs	☐	☐
Planning/Goal setting	☐	☐	Marketing by individual store	☐	☐
Marketing by store clusters	☐	☐			

Please list any other uses of scanning/POS data in the advertising department.

	1989	1990
______________________________	☐	☐
______________________________	☐	☐

VI. TYPES OF ADVERTISING AND PROMOTIONS

28. Looking at the following list, is your ad-group currently involved in any of the following areas or are you planning on becoming involved in 1990? (Please check all applicable)

	1989	1990		1989	1990
Frequent shopper programs	☐	☐	Marketing by store cluster	☐	☐
Electronic coupons	☐	☐	Direct mail	☐	☐
Marketing by individual store	☐	☐	Other types of promotions (If you answer OTHER, please specify below)	☐	☐

____

____

29. How does your ad-group measure the effects of its advertising (please check all that apply)?

Sales ☐
Inventory Management ☐
Customer Traffic ☐
Coupon Redemption ☐
Customer Reaction ☐
Management Reaction ☐
Customer Surveys ☐
Scanning/POS data ☐
Other (please specify) ____________________

____

30. Please check if your ad-group runs individual ads or entire campaigns emphasizing any of the following areas. Also, please check if it was an individual ad only or part of a campaign. Check also if you did so 1989 or plan to for 1990

	1989		1990	
	ADS	CAMPAIGN	ADS	CAMPAIGN
Quality produce/produce department	☐	☐	☐	☐
Quality meats/meat department	☐	☐	☐	☐
Food and product safety	☐	☐	☐	☐
Nutrition/Health	☐	☐	☐	☐
Environmentally safe products, packaging, etc.	☐	☐	☐	☐
Store Image	☐	☐	☐	☐
Public Service	☐	☐	☐	☐
Low-price/Price promotion	☐	☐	☐	☐
Good variety/wide selection	☐	☐	☐	☐
Good service	☐	☐	☐	☐

Please name any other features of your group's stores that you emphasized in your advertising and check if it was in individual ads only or in campaigns. Check also if it was in 1989 or planned for 1990

	1989		1990	
FEATURE EMPHASIZED:	ADS	CAMPAIGN	ADS	CAMPAIGN
____________________	☐	☐	☐	☐
____________________	☐	☐	☐	☐
____________________	☐	☐	☐	☐
____________________	☐	☐	☐	☐

VII. GENERAL COMPANY INFORMATION

31. How many supermarkets are in this ad-group? (a supermarket is a retail food store with at least $2 million in annual sales)?. ___,___ ___ ___ supermarkets

32. What will be the total annual food sales for all the firms in your ad-group 1989? (if exact figures are not available, please estimate)

$___ ___,___ ___ ___.___ million

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1990
QUESTIONNAIRE ON HEALTH-CARE ISSUES

This survey is part of FMI's annual study, designed to track trends in the food distribution industry. You are encouraged to participate so that we may obtain data as representative of the industry as possible. Please answer as many questions as you are able. All individual company data will be held in strictest confidence. If you have any questions, please feel free to contact Mike McCarthy in our research department at 202-429-8277.

PERSPECTIVES ON HEALTH-CARE

1. Please rank from 1 to 5 in order of seriousness the following issues facing your company with one as the most serious.

____ labor shortage

____ health-care costs

____ substance abuse problems

____ solid waste

____ food safety

____ other (please specify)____________________

2. Please rank in order of seriousness the following problems with the current national health-care system, with 1 the most serious, 2 the second most serious, etc.

____ high cost

____ over utilization of medical services

____ gaps in coverage (uncompensated care for uninsured)

____ quality of medical care

____ other (please specify)____

3. What do you think would be the most effective way to control employer-provided health-care costs? (Please rank in order with one the most effective, two the second most effective, etc.)

____ shift a greater amount of the cost burden to the employee

____ control utilization of medical services through managed care approaches

____ change employee attitude and behavior by wellness and health promotion programs

____ introduce national health insurance or some other type of universal health care system

____ cap health-care provider compensation

4. Which of the following types of health-care mechanisms would you be in favor of seeing introduced? (Please check all that apply)

/__/ a voucher program to enable individuals to buy medical care

/__/ tax-free savings accounts for individuals to purchase medical care

/__/ tax incentives to encourage individuals to buy long-term care insurance

/__/ required (mandated) employer-provided benefits

/__/ government provided health-care services

/__/ none of the above

5. Would you be in favor of a tax financed universal health-care system*? (Please check only one)

/__/ no

YES . . . . /__/ financed by sales tax

/__/ financed by a tax on cigarettes/alcohol

/__/ financed by income tax

* A universal health-care system is any system, whether it be government-financed or otherwise that would provide access to all Americans.

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6. **Please rank the following three statements in order of their importance with one being the most important and three being the least important.**

____ The American health-care system should provide all citizens with adequate health-care services.

____ The system should seek all possible methods to control costs.

____ The system should aim to ensure that all families do not suffer catastrophic financial losses because of ill health.

7. Do you think every resident should, by law, be enrolled in an adequate health-care plan to cover catastrophic health-care costs?

☐ YES ☐ NO

8. Do you think that obtaining health-care should be an individual, government, or employer's responsibility? (please check only one)

☐ individual ☐ government ☐ employer

9. Please check any of the following which you think are the proper role of the government:

☐ to monitor the health market;

☐ to subsidize needy individuals to allow them to obtain efficient service;

☐ to encourage competition.

10. Would you support a health system including all of the following: government control or ownership of hospitals, physicians employed directly by the government or working under contract to the government and financed through general tax revenues?

☐ YES ☐ NO

11. Do you think it is necessary to provide health benefits to attract and retain employees?

☐ YES ☐ NO

12. Please indicate the way you think each of the following aspects of the health-care system should be handled (Check only one per category)

Choice of Care and Facility

☐ individual free choice

☐ government decisions

Control of Health Facilities

☐ publicly owned

☐ privately owned

Determination of Prices and Fees

☐ Federal Government regulations

☐ State/local control

☐ Free market mechanism

☐ Insurance providers

Health Care Practitioners' Employment

☐ Federal employees

☐ State/local employees

☐ Private practitioners

13. Rank the following statements in order of importance beginning with one being the most important and four being the least important.

☐ Universal health coverage should be made available.

☐ Consumers should have the free choice of medical care providers.

☐ Physicians should be able to function with a minimum of government regulation.

☐ Health care costs must be controlled.

14. On the lines below, please write any other ideas you have about controlling health-care costs.

____

____

____

____

MEDICAL PLAN INFORMATION

15. Do you provide medical plan coverage for your employees?

____ Yes, salaried only

____ Yes, hourly only

____ Yes, both hourly and salaried

____ No, go to question 23

16. On average, how many hours a week must an hourly employee work to be covered under your medical plan?

____ ____ hours per week

17. How long (in days) must an hourly employee be on the job to be covered under the plan?

____ ____ ____ days

18. Is your medical plan(s) covering hourly employees a union negotiated, collective bargained plan(s)?

_____ Yes, at all locations

_____ Yes, at some locations

____ No

19. Complete the following plan information for hourly employee medical plans (estimate if unsure of exact amounts).

a. Individual Employee Coverage

	1987	1988	1989
Monthly plan premiums	$________	$________	$________
Monthly employee contributions	$________	$________	$________
Deductible amount	$________	$________	$________
Coinsurance, co-payment amount paid by plan (expressed as percentage of total costs)	________%	________%	________%
Maximum out-of-pocket expense paid before all expenses are paid by the plan (If your maximum expenses paid are based on salary, please provide an average number for all employees)	$________	$________	$________

b. Family Coverage

	1987	1988	1989
Monthly plan premiums	$________	$________	$________
Monthly employee contributions	$________	$________	$________
Deductible amount	$________	$________	$________
Coinsurance, co-payment amount paid by plan (expressed as percentage of total costs)	________%	________%	________%
Maximum out-of-pocket expense paid before all expenses are paid by the plan (if your maximum expenses paid are based on salary, please provide an average number per employee)	$________	$________	$________

20. What type of funding method do you use in relation to your hourly medical plan?

☐ self-funded medical plan

☐ purchased through a commercial insurance company

☐ combination of both

21. Please check any of the following types of alternative health-care delivery systems or managed care programs that you currently utilize.

☐ Health Maintenance Organization

☐ Preadmission testing

☐ Non-surgical outpatient care

☐ Hospital bill audit

☐ Preferred Provider Organization

☐ Second surgical opinion

☐ Precertification of inpatient days

☐ Surgical outpatient care

22a. What was the average medical claims cost per hourly employee in:

1987 $__________ medical claims cost per employee

1988 $__________ medical claims cost per employee

1989 $__________ medical claims cost per employee

22b. What was the percentage increase in your hourly medical plan premiums in each of the following time periods?

1987 over 1986 ________% 1988 over 1987 ________% 1989 over 1988 ________%

GENERAL COMPANY INFORMATION

23. Is your company a: (please check the one which best describes your business)

_____ retailer _____ wholesaler

24. If you are a retailer or a wholesaler operating company-owned stores, how many supermarkets did your company operate in 1989 (a supermarket is a retail store with annual sales of at least $2 million)

____,____ ____ ____ supermarkets

25. If you are a wholesaler, please check the category which best describes your company.

_____ Cooperative wholesaler _____ Voluntary wholesaler _____ Unaffiliated wholesaler

26. In what region(s) are your stores and/or distribution centers located?

☐ New England

☐ Middle Atlantic

☐ Southeast

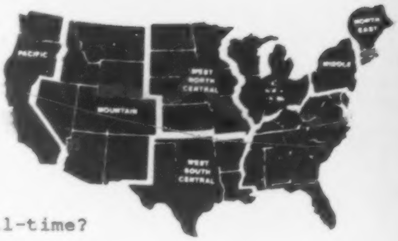
☐ West South Central

☐ East North Central

☐ West North Central

☐ Mountain

☐ Pacific


PACIFIC
MOUNTAIN
WEST NORTH CENTRAL
WEST SOUTH CENTRAL
MIDDLE
NORTH EAST

27. How many hours per week must an employee work to be considered full-time?

____ ____ hours

28. Please provide the best estimate of your employee population:

NUMBER OF HOURLY FULL-TIME WORKERS		NUMBER OF HOURLY PART-TIME WORKERS		
Age	Male	Female	Male	Female
Under 17				
18-30				
30-45				
45+				
TOTAL EMPLOYEES				

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FOOD MARKETING INSTITUTE

FOOD MARKETING INDUSTRY SPEAKS, 1990
QUESTIONNAIRE ON SEAFOOD IN THE SUPERMARKET

The Food Marketing Institute has developed this survey to examine trends and developments in supermarket seafood operations. Please answer as many questions as possible. Please provide data for your current seafood operations in 1989. All individual data are held in strictest confidence. If you have a question, please feel free to contact Mike McCarthy in the FMI research department at 202-429-8277. You will receive a complimentary copy of the completed report.

I. GENERAL COMPANY INFORMATION

1. How many supermarkets is your company currently operating (a supermarket is a retail food store with at least $2 million in annual sales. ___ ___ supermarkets

2. What will be your company's total annual food sales in 1989 (Please check the appropriate category)?

☐ Under $10 million
☐ $10 million to $30 million
☐ $31 million to $100 million
☐ $101 million to $250 million

II. SEAFOOD OPERATIONS

3. How many supermarkets does your company operate that feature: . . . .
Fresh seafood ___ ___
Frozen seafood * ___ ___
Other seafood ** ___ ___

4. How many supermarkets does your company operate that feature:. . . . .
Full-service seafood ___ ___
Self-service seafood ___ ___

5a. How many of your stores have a seafood department, with its own manager? ___ ___

5b. In the year 1991, how many of your stores will have such a department? ___ ___

6. In how many of your stores do the following departments receive credit for seafood items:
Seafood Department ___ ___
Meat Department ___ ___
Deli Department ___ ___
Other Department ___ ___

7. On average, what are your weekly seafood sales, per store, in dollars, per week? $___ ___ ___,___ ___ ___

* Frozen fish excludes branded, packaged frozen foods
** Other = canned, dried, cured, etc.

8. What was your gross margin for:

Total Seafood Sales . . . . __ __%

Fresh Seafood . . . . __ __%

Frozen Seafood* . . . . . . __ __%

Self-service Seafood . . . __ __%

Full-service seafood . . . __ __%

9. On average, how many LINEAR FEET of cases in your stores are devoted to:

Fresh seafood . . . . __ __ linear feet

Frozen seafood * . . . . __ __ linear feet

Other seafood ** . . . . __ __ linear feet

Self-service seafood . . . . __ __ linear feet

Service seafood . . . . __ __ linear feet

III. SEAFOOD EMPLOYEES

10. What is the average number of employees per store devoted exclusively to seafood?

__ __.__ full-time employees

__ __.__ part-time employees

__ __.__ employees shared with another department

_ __.__ full-time equivalents
(A full-time equivalent is a position that requires 2080 hours per position calendar year.)

11. Do you offer special training for employees handling seafood?

☐ YES (Go to question 10)
☐ NO (Go to question 12)

12. On average, how many HOURS of training do you provide:

New employees . . . . __ __ hours per year

Experienced employees . . . . . . __ __ hours per year

13. What TYPES of training do you provide (please check all that apply)?

☐ Seminars

☐ Certification programs

☐ Videos

☐ Self-training using manuals or other prepared materials

☐ Other methods (please specify) ________________________________

____

* Frozen fish excludes branded, packaged frozen foods
** Other = canned, dried, cured, etc.

IV. TRENDS IN SEAFOOD BUYING AND SALES

14. Have your buying habits changed in the past two years? (If you answer NO to all three, please skip to question 16):

Finfish	Yes ☐	No ☐
Shellfish	Yes ☐	No ☐
Frozen seafood	Yes ☐	No ☐

15. How have you changed your buying?

A. Finfish ______________________________

____

____

B. Shellfish ______________________________

____

____

C. Frozen Seafood ______________________________

____

____

16. Please name your top three selling seafood items in order:

1. ______________
2. ______________
3. ______________

17. Do you think fish and shellfish should be federally inspected?

YES ☐ NO ☐

18. Will prepared foods play a (please check):

☐ greater role in seafood related sales by 1991?

☐ lesser role in seafood related sales by 1991?

☐ same share of seafood sales in 1991 as now?

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